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ABSTRACT

This manual describes the implementation of the Far West Laboratory's educational research and development management training program for women and minorities and offers guidelines to institutions and industries creating their own internship programs. A chapter on holistic learning for executives analyses a model incorporating a coordinating council composed of management staff and the use of mentors, seminars, coursework, supervised on-the-job training, and peer teamwork. The following chapter addresses questions for institutions considering implementing training programs. A section devoted to knowing the power structure suggests ways of involving top administrative personnel in developing the program. Installation of the program is outlined in chapters on development of a coordinating council, selection of a project director, the role of mentors, and the intern selection process. Describing the program in action are chapters on the interns' planning process and intern meetings, case studies showing how two interns used the resources of the program to advance themselves, and the project director's duties in keeping it running. A summary of program content discusses the improvements in knowledge and skills that interns gained under the general areas of program management, technical writing, knowledge of funding sources, and professional expertise. A final chapter considers obtaining graduate accreditation for participation in the program. (MJL)

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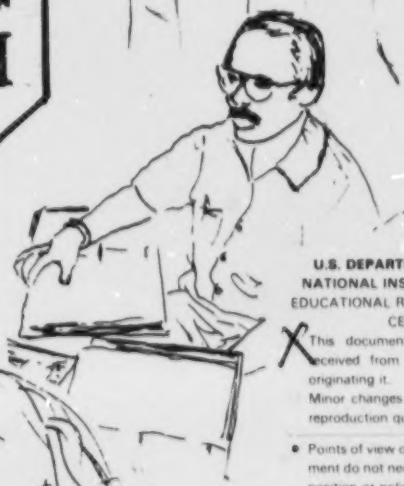
AN EXECUTIVE TRAINING PROGRAM



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by

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FAR WEST LABORATORY
FOR EDUCATIONAL RESEARCH AND DEVELOPMENT

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EXECUTIVE SUMMARY

PREFACE

The model presented in this book is based on the 4½-year management training program that was developed and implemented at Far West Laboratory for Educational Research and Development. All of the interns in the program advanced significantly as measured by increased salaries, increased responsibility for budgets and staff, obtaining of management level titles, and increasing their professional visibility in their field. Seventy percent of them became executive directors of projects, and another twenty achieved the potential for holding executive positions but had not due to the major reductions in funds for educational research and development. They have, however, obtained management level positions in the private sector.

The purpose of this book is to enable educational institutions and private industry to develop their own internship programs for developing their potential leaders from within. The following is a summary of what is presented in this book.

HOLISTIC LEARNING FOR EXECUTIVES

An integration of the American and Japanese way provides for an executive training model which involves personnel from all levels of the institution. Management staff are part of a coordinating council which sets policy and oversees implementation; accomplished administrators within the institution work as mentors with interns to advise and assist their planning individual programs. In addition, seminars, coursework and supervised on-the-job training are provided; and interns learn from each other through peer teamwork.

DO YOU NEED AN INTERNSHIP PROGRAM?

Critical questions to determine whether or not to develop an executive training program in your institution are posed and discussed, e.g., would a training program:

- bring additional money?
- fill expected vacancies?
- facilitate developing new leadership material?
- enhance the image of the institution?

Each of these are discussed with examples and guidelines for answering the questions yourselves.

KNOWING THE POWER STRUCTURE

An executive training program can be effective only if those in power within an institution are in support of the program. Means by which to identify and involve members from the top administration in the development of the program are provided.

Involvement of management as members of the governing council for the program and as mentors to interns are two ways which are discussed.

THE COORDINATING COUNCIL

The development of a governing body, i.e., a coordinating council, is essential for the success of the program. The composition of the council is detailed and criteria for selection of council members are provided.

Examples of the guidelines for the function of the council are outlined together with examples of the council meeting agendas. These illustrate the role this body plays in making policy and selection of interns.

SELECTION OF A PROGRAM COORDINATOR

Selection of a project coordinator who is an effective administrator, creative, able to work with personnel at all levels, and able to orchestrate the activities of interns, mentors, and able to secure local training resources is essential to the program. The coordinator's role is discussed in all aspects.

THE MENTOR

The mentor is not only a model but a guide to an intern. The role of this person within the program is detailed as is the criteria for the selection of those within your institution who best exemplify executive capability.

In addition to being able to model, the mentor must have the ability to work in a team effort with a director, other mentors and interns.

SELECTION OF INTERNS

The program is only as good as the potential executives who are selected.

The procedure that was effective in the selection of educational research and development executives is provided. This includes a memorandum that was used to advertise the positions, the questions to which the applicants responded, and means by which their work histories and statements were interpreted. The indicators of executive potential can be found in an individual's work history and the clarity with which he/she state their professional goals and aspirations.

HOW AN INTERN PLANS

Interns formulate quarterly plans with the help of their mentors. These include short-range objectives which must lead to achieving a long-range goal of being competent at the executive level.

They must show competence in four major areas: project management, grantsmanship, technical writing, and an area of professional expertise.

Examples of the teamwork between intern and mentor in planning quarterly objectives are provided.

INTERN MEETINGS

Learning from peers is an essential aspect of this model. Monthly meetings are held to provide information to serve as occasions for training through workshops and seminars, and as a means for interns to learn from each others efforts.

An outgrowth of these meetings are friendships and professional relationships between interns which serve to help each of them to use peer support and counseling.

Examples of how two interns used their peer relationship to increase their learning are provided.

MAKING THINGS GO TOGETHER

Case studies are presented to show how two interns used funds, coursework, peer relations, guidance by mentors, and on-the-job training to advance themselves.

Two such studies are provided in this section.

KEEPING IT GOING

The coordinator of the project has the task of orchestrating the work of the coordinating council, interns and mentors, and of creating relevant training resources within the institution. An essential requirement for coordinating such a complex project is clear communication between all the parties involved. The use of meetings, reports, individual conferences, and regular telephone contacts are described.

ACCREDITATION FOR THE PROGRAM

Obtaining accreditation from a local university increases the credibility of a program and facilitates the upward advancement of potential executives.

Obtaining accreditation requires matching the intern training with the coursework that leads to an MBA, or an administrative credential. Suggestions for accomplishing this are stated.

ACKNOWLEDGEMENTS

Much credit should go to Martha Benson Downey and Vivian Faye for their contributions to the completion of this book. Marty, my very able project assistant, was helpful with her editing, writing, and administrative skills. She was especially involved in the conceptualization of the first version of this book through brainstorming sessions and discussion of content and sequence. Marty also helped implement this program during the last two years.

Vivian's artistic skill gives life to the book through her illustrations, most of which she produced. Vivian is mainly responsible for finding examples of formatting which led to the selection of the one used in this book. Her persistence in keeping to the task during the final writing was also invaluable.

I thank Marty and Vivian and Fran Bairley, who, as project assistant during the initial two years, helped me pioneer the development of this program. I am grateful and proud of all of our work together.

This book would not have been possible without the origination of this program by the group of which I was part in 1977. Many of these professionals in educational research and development continued as members of the Coordinating Council and helped to formulate and to improve the program throughout its four year development.

This is to acknowledge the value of the contributions each made in numerous meetings and through individual work with interns. Members are to be recognized for their time and willingness to give of their expertise and commitment to advancing women and minorities to executive positions. I give special acknowledgement to Betty Ward, Ph.D.; Lisa Hunter; George Rusteika, Ph.D., Beverly Lee; Margaret Robinson; Stanley Chow; Leonard Beckum, Ph.D.; and Matilda Butler, Ph.D.

An Executive Training Program

HOLISTIC LEARNING FOR EXECUTIVES

AN INTEGRATION OF THE AMERICAN AND JAPANESE WAY

According to an old proverb:

> "I hear and I forget,
> I see and I remember,
> I do and I understand."

The most effective learning is by doing, but in order to know what we are doing, we must get explanations, readings, lectures, discussions from and with others. By holistic, we mean that an effective learning program includes information, interchanges with others, support from the personal environment, and application to real situations.

The Japanese have been especially effective in developing their leadership from within their own corporations. Studies of the Japanese system for promoting their administrators shows that leadership of companies genuinely believe that if an individual's capabilities are unfulfilled, then "there is a great loss to himself and to society." On a practical level, Japanese companies believe that the growth of the Japanese economy has been made possible by the development and training of its work force. With these two thoughts in the forefront, the development of the Japanese employees is nourished by the combined effort of management, organizational structure, and a supportive work environment.

Companies implement policies which:

- provide training in a systematic way at all levels;
- managers assist employees in their growth both on a one-to-one basis and in their participation in group training;
- education and training is offered at all levels;
- both employees and managers view themselves as part of a family and mutually-responsible for the growth of the organization.

By contrast, the American philosophy is survival of the fittest. Aspiring managers must prove themselves

There are five aspects to the Japanese training system (Saint, 1982) from which we may learn:

1. The emphasis is on long-range goals, that is, managers are judged by their ability to produce over a long-term, thus giving them a chance to develop their skills adequately and to produce over the long term.

2. Training and education are provided as part of the responsibility for having a healthy employment environment and not as first aid treatment or special privilege to those few selected by management.

3. The planning of both the short, middle and long-range goals is thorough, detailed, comprehensive. By that is meant that all people who will be involved in the learning contribute to the decision and the planning for the parts they will play in helping each other.

4. The plan for accomplishing objectives is systematically followed through. All the people involved are clear about the goals, and what they expect of each of them in order to accomplish them. They check themselves with periodic evaluation.

5. A person who is hired is viewed as a total person who can develop with the help of the organization and his or her own efforts. Individuals are not seen as cogs in a wheel able to perform only one or two jobs. The development plan includes rotational placement and exposure to positions to which an employee may develop him or herself.

The American system has demonstrated its effectiveness with its survival of the fittest philosophy, at least on the surface. Underneath there is in existence supportive and nourishing systems within any organization. The point is that they tend to be covert, highly exclusive, self-protecting, and, therefore, inefficient.

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* Saint, Avice, Ed.D. Continuous Learning Within Japanese Organizations. San Francisco, CA 94103: Far West Laboratory, 1982

and make themselves visible to those who can promote them. Those who do not produce remain in lower level jobs or those who fail to produce at the management level soon leave the organization.

In the American way, training is seen as a remedy to poor performance or as a somewhat random approach to boosting some of the employees to produce more. This approach is somewhat akin to giving high potency vitamins in the hope that the health of the individual will improve. Management training is provided by some corporations but almost all of the responsibility is left up to the individual. If a potential manager is sent on a three-month intensive training program, he is expected to return either to show greater production or more promise for being an asset to the company. This approach is in contrast to the Japanese view which makes the entire system responsible for the improvement of each individual. A person who is sent for intensive training might go with an entire group and will then return and share the learning with other management personnel. Then together they continue to apply what they have learned to continue their growth within their system.

The American way is not entirely Darwinian in its approach. There is the "old boy" network which covertly serves to promote those who both seem to fit best at the power-wielding level and who show potential for being management material. This "old boy" network doesprovide some murturing but not in any systematic way. The system primarily serves to facilitate the promotion of an individual and then to protect that person from being fired and by providing information and tricks of the trade which will make it easier for that person to survive and progress in the system.

This still does not approximate the Japanese approach which is one of providing a supportive and nourishing environment of people with positive attitudes towards learning.

A combination of the Japanese approach and the American approach is not only possible but can be doubly effective by virtue of taking the best from both.

The internship program developed by Far West Laboratory under the Women and Minorities Leadership Program, has done just that. This is a model that can be adopted by any corporation or school system to develop those employees with the potential for leadership and management.

This model is based on the five aspects which are similar to those used by the Japanese.

1. Management can be systematic in developing their leaders by being on the board which develops policy, implementation and oversees the program for leadership interns. This enables those already in the administratiion to give of their experience and expertise and to learn from each other for the benefit of the interns in the process.

2. Cooperation between management interns and managers is developed through a mentor and advisor and consultant system. Those with expertise enough to serve in these three roles are identified both from within the institution or company and from the outside. They identify and select those who serve in these nurturing roles, thereby ensuring that they are part of the management system and the supportive environment.

3. Both mentor and intern are responsible for devising short and long-range goals and specifying what they expect from each other in the course of the intern's development. These expectations and objectives are also made known to the coordinating board. This enables all who are involved to know how they are promoting development.

4. The development of a management intern is based on providing for many aspects of the individual's professional development. The intern not only learns specific management strategies but develops in personal areas, such as, self-confidence in dealing with individuals, knowing a variety of jobs, i.e., accounting, planning a budget, decision-making at board meetings, sales representation, or managing a word processing department.

5. The individual is primarily responsible for his or her learning, but he/she can count on the cooperation and support as well as constructive criticism of the others who are involved in promoting new management personnel.

WHAT THE PROGRAM PROVIDES

The program provides:

1. opportunities and resources for learning new skills and knowledge; and

2. opportunities to gain recognition from other professionals both within their institution, regionally and nationally.

This combination of learning and recognition results in interns attaining more responsible career positions. The strategy is to provide the opportunities and skills and the visibility in their fields.

To accomplish this, the Women and Minorities Program puts at the interns disposal the use of a mentor selected from the ranks of professionals directing programs or in leadership positions, consultants to assist them with a variety of special areas of research and education, tuition for university coursework, a resource library on the subject of management and leadership in education, tuition to attend professional seminars and conferences, and most important of all, guidance for creating opportunitite for them to learn while doing a job. Each intern is given an allowance of $2,000 to subsidize their individual program.

They handle this very much as a research project director handles the money granted by a funding source in Washington, D.C. They propose what they will use the funds for in their effort to develop new skills.

WHO THE INTERNS ARE

The women and minorities who have participated in this program have been professionals already in the field of education. They were selected for their potential leadership and were employed at FWL or in outside agencies such as in local school districts, i.e., Oakland and San Francisco, California. These women and men held such positions as school psychologist; field trainer who traveled to different school districts to provide workshops, consultations to

administration, and direct work with teachers; staff member of a proposal writing training team; and staff member in a school district evaluation department who was responsible for administering tests, collecting data and developing reports for the board.

These interns demonstrated their potential for leadership at the time of application by submitting a resume which gave evidence of their initiating new ideas or programs or efforts beyond the regular job requirements as evidenced in their work history. Their cover letter was an essay stating why they wanted leadership training and what they thought they could contribute to the leadership program from their own experience and foresight. Their applications were assessed by a committee for indications that these individuals were self-directed enough to use the resources that the program provided to advance themselves professionally. An intensive interview provided evidence of the individual's ability to think spontaneously and to show how clear they were about their knowledge and strength and what they wanted from the program.

The interns were almost all women, 85% of the total, ranging in age from 30 to 38. All but one were educated at the master's degree level or had equivalent experience in the field.

WHAT AND HOW INTERNS ACHIEVE

Interns aspire to direct their own research projects in education. To do this, they add to their leadership and management skills through on-the-job training. They concentrate on four major areas of knowledge:

1. development of professional expertise, i.e., knowledge of a specific subject, issue or skill area, credibility in the field and support of other professionals in the field;

2. project management, i.e., planning, supervision, communications and reporting, and budgeting;

3. technical writing, i.e., conceptualizing and writing quality documents such as proposals, reports, or journal articles for a variety of intended audiences; and

4. grantsmanship, i.e., knowledge of funding sources, procedures for obtaining funds and strategies for establishing and using a network in a particular field.

At the beginning of an internship the individual examines his work history and assesses his/her strengths and weaknesses in the four areas. This is done with the assistance of an advisory who is already a project director or leader in the field of education. From this assessment each intern formulates his or her own sequence of learning through coursework, consultation, professional seminars, and on-the-job training.

It is up to the intern to use the resources that are provided, i.e., the advisor's knowledge and skill, the short-term consultants for consulting in special areas, and opportunities that are available or can be created for on-the-job training. The intern's effort at initiating for him or herself is part of the leadership development.

HOW AN INTERN PROCEEDS IN AN INDIVIDUALIZED LEARNING PROGRAM

The principal support for interns' planning and learning efforts are their mentors. With their mentors they examine their professional weaknesses and strengths, plan their learning courses on a quarterly basis and review their accomplishments at the end of these periods. They are free to meet as often as they wish to discuss their professional needs with their mentors, but no less than once a month.

In their quarterly planning they not only state clearly what objectives they hope to achieve but how and who they will use to achieve them. For example, an intern wishing to learn about methods of program evaluation stated the objective for a quarter was to learn enough about program evaluation to be able to provide training in the field. To accomplish this, she arranged to meet with an expert in the field of program evaluation from FWL, scheduled to attend a professional workshop and conference with a nationally-known evaluator on program evaluation, applied the new knowledge to evaluating the project within which she worked and developed a workshop for administrators in continuing education on the subject of methods of formative evaluation.

This intern's learning about evaluation not only enabled her to learn new skills, but also to serve a need of the project which she was co-directing. In this way she both performed her job and learned new skills with the help of this program.

INTERNS LEARN FROM EACH OTHER

An intern council meeting is scheduled at least once a month to give interns a chance to talk about what they are learning and how they are learning. These meetings are used as seminars, or opportunities to invite other professionals to speak on a special subject, but primarily, they provide opportunities for them to form friendships or professional relationships which they can use outside the group.

Those who are more assertive tend to seek each other out for support and for getting information to accomplish particular things. For example, a woman who was seeking an administrative job arranged to have lunch with two other interns, one who knew the district politics quite well and another who knew the field of special education for the handicapped. She used these meetings to learn how to handle the interview for the job and to give herself confidence that her own knowledge was sufficient to qualify her for the position. She in fact did get the job. Interns not only get moral support and information from each other, but also spur each other on to learn by modeling for and competing with each other.

HOW THE PROGRAM IS COORDINATED

The Project Director is responsible for maintaining communications with the funding source in Washington, D.C., calling and conducting meetings of the interns, maintaining communication with each intern and his or her mentor, developing and maintaining a resource library, circulating information regarding professional coursework, seminars and workshops, providing some training and substituting as an advisor to complement what each intern's principal mentor is doing with them.

The Project Director is involved in all aspects of the program. He or she meets with both the mentor and intern for quarterly planning meetings, and serves as a go-between between mentors and interns when problems arise.

In addition to these everyday functions the Director is also responsible for developing and improving the program, managing the budget, and documenting and evaluating the progress of the program.

HOW THE PROGRAM GETS INSTITUTIONAL SUPPORT

A Council made up of professionals from influential positions within an institution serve as policy-makers and overseers of the program. They plan a key role in recommending a course of development, ideas for dealing with issues, issues of training, and as mentors to interns.

Through the monthly meetings of this Coordinating Council, the progress of the interns is made known and the members themselves are in a position to advocate by suggesting new resources within the institution for interns to use, or by creating or providing opportunities for interns to learn from actual experience. The teamwork between the Coordinating Council and the Project Director is essential for the internship program to be effective. Each needs the other. The Project Director orchestrates the actual functioning of the program and has a direct relationship with the interns and institutions outside of FWL and the Coordinating Council has the authority and influence within the institution to make the program credible to other administrators within the institution and to give sound advice to the Project Director regarding ideas and methods for improving the program.

THE FOUNDATION FOR THIS INTERNSHIP PROGRAM

This Guide is based on a 4½-year management training project designed to serve as a model for increasing the participation of women and minorities in educational research and development (R&D) at the top.

The project contributes to making American education more responsive to the needs and concerns of women and minorities and helping to ameliorate the underrepresentation of women and minority professionals in educational R&D on both the regional and national levels.

The success of this program in educational research and development can serve as a model for other educational institutions and private industry in that it has proven to be an effective executive training program. School districts can promote potential administrators, and the private sector can enable those with leadership capability to develop into executives.

DO YOU NEED AN INTERNSHIP PROGRAM?

QUESTIONS AND CONSIDERATIONS

Your institution will only invest money and professional time for promoting administrators or leaders if there is an actual need for them and/or those in power positions are willing to accept new minds in the leadership ranks. This section of the book helps you to ask yourself questions which will enable you to answer the question, Do you need an internship program?

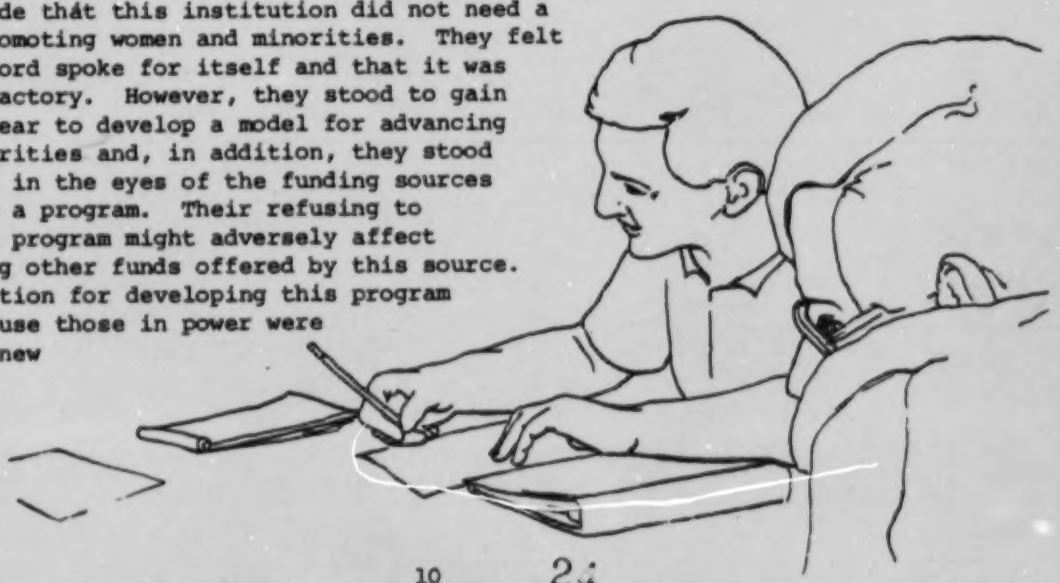
The questions focus on whether or not this type of a leadership program:

- Brings in additional money
- Fills expected vacancies without rocking the boat
- Makes obtaining new leaders easier
- Enhances the image of your institution in the public's eye

BRINGS IN ADDITIONAL MONEY

The most powerful motivator for an institution is added income. If money is available from the government or a private funding source, this government would certainly appeal to those at the head of administration, however only if such a project would not cause more problems than it was worth.

For example, the developer of this model, FWL, initially had the attitude that this institution did not need a vehicle for promoting women and minorities. They felt that their record spoke for itself and that it was already satisfactory. However, they stood to gain $100,000 per year to develop a model for advancing women and minorities and, in addition, they stood to look better in the eyes of the funding sources by having such a program. Their refusing to implement this program might adversely affect their obtaining other funds offered by this source. So, the motivation for developing this program was money because those in power were not welcoming new leadership outside their own closed system.



In your case, your concern may not be whether or not you will receive funding but what the cost effectiveness of the program would be. You would want to know the cost of the program versus the advantage of reducing turnover and increasing the probability that your new administrators will perform well by producing your own leadership.

This program requires a part-time coordinator, paid release time for interns, advisors, mentors, and short-term consultants, and possibly some tuition for special conferences or courses. Specifics about costs will be covered in a later section of this book.

FILLS EXPECTED VACANCIES IN POSITIONS OF LEADERSHIP OR ADMINISTRATION

A common way by which leadership positions are filled is through the "ole boy" network. Those at the top and in power will select others who will agree with their manner of running things and who will not compete with them. A program for promoting future managers would not be welcomed unless those in power felt assured that graduates of the program would "fit". This is not an unreasonable attitude given that those in power who believe that they are doing the best job in the best way and prefer more people like themselves with whom to work.

To assess the need for this program, you need to count the anticipated vacancies in leadership or administration positions and then consider the means by which these kinds of vacancies have been filled in the past. Unless an internship program enhances rather than threatens the power structure, it will not work.

The experience at FWL was that the development of leaders did not threaten the administration and in fact, made it easier for them to identify potential project directors. Confidence in the program was developed because key people from the power structure were involved as consultants to interns, as board members, and as active contributors to implementation of the program.

MAKES THE JOB OF PROMOTING NEW LEADERS EASIER

An internship program can serve as the testing ground for those who are chosen from the ranks to aspire to positions of leadership. A good program will consist of opportunities to show leadership capability and

initiative. However, such a program could also cause problems to the administration in that people whom they may not want in leadership positions may prove to be more capable than those who have been identified as friends of the power structure. Those in authority would need to have an influential role in the development and implementation of a leadership program in order for them to have confidence in those who complete the training.

The common path for advancement to leadership is through proof of competence and favorable relations with those who do the promoting. The internship program would need to be an extension of the authority of those who are most influential within the system.

ENHANCES THE IMAGE OF THE INSTITUTION

If having such a program is favorable to the institution when viewed by the public or other agencies, the institution will want to develop it and to maintain it. Such was partially the case with FWL. Having a women and minorities leadership program not only was required by the funding source but made the institution appear to be examplary in their affirmative action efforts. FWL could not only point to their record of advancement of women and minorities but could add that they were formalizing and developing a model for insuring the future promotion of these individuals.

Your concern might be whether an internship program would be viewed favorably by the board of directors of your institution and/or the public whom your institution serves. For example, your board of directors may be impressed by the fact that you are grooming future managers from your own ranks and thereby insuring a method of rewarding those who are dedicated workers and that the high quality of production or performance will be insured.

SUMMARY

In short, if having an internship program will bring in money, or not cost your institution very much, can be used to fill anticipated vacancies, can serve as a testing ground for future leaders, and will make your institution look better in the eyes of the public or others, then you have a good basis for starting such a program.

Having read through this section, note that it is not necessary that your institution meet all of these requirements. Simply ask yourself whether any one or more of these is sufficient to encourage your institution to start such a program:

- Will it bring in additional money?
- Will it make the procedure of grooming new managers easier?
- Will it fill the needed positions?
- Will having the program enhance the image of your institution?

KNOWING THE POWER STRUCTURE

INTRODUCTION

The success of this internship program depends on its being supported by the major decision-makers in the administration. This section provides a means by which to identify the major decision-makers and describes how support of FWL administration was obtained and made effective in the program.

IDENTIFYING THOSE IN POWER POSITIONS

In order for an internship program to work, you must have the backing of those who are most influential in your institution. Without this policy and moral support, graduates of your intern program will not really be eligible to fulfill leadership vacancies or to receive real recommendations for jobs in other places.

An internship program without the backing of those who are in a position to promote the program ends up as a token gesture or window dressing to satisfy the institution's need to appear as if they are supporting a useful program.

Power structures vary in their nature, and in order for you to know what kind of internship program would work, you need to know who to include on the policy-making body of the program.

The following are questions to ask yourself to determine where the sources of power are:

1. Who has regulative authority over the expenditure of funds? Or, who holds the purse-strings?

2. Who has the power to appoint people in top-level positions?

3. Who has direct influence to the board of directors of the institution?

4. Whose opinion influences policy-making the most?

5. Who can delegate authority and set deadlines for others to meet?

6. Who writes the agendas for major meetings?

7. Whose opinions and statements command the most attention in administrative meetings?

8. Who has the authority over other administrators?

A simple rule of thumb for determining the nature of power is that if one person seems to fill all of these roles, then you very clearly have an autocratic structure. If your answers to these questions identify a number of people who work closely with each other, then you have an "old boy" network. However, if your answers to these questions identify a number of people and these represent sub-groupings, then you have a more centralized distribution of power which may or may not be democratic, depending on the nature of the sub-groups.

You also need to consider those people who may not have administrative authority, but who have power by virtue of some other special status. For example, recognized leaders of an employees' union, of minority groups, of women for affirmative action groups, or of advocates of parents in a district school system. These groups can have power by virtue of being able to negotiate directly with those of designated authority for the institution. If your institution consists of groups such as these, you need to consider what their relationship to those in charge of the institution is.

RELATING THE POWER STRUCTURE TO THE PROGRAM

You will not necessarily have the support of all of those in authority for an internship program. What is important is that the balance of power is in support of the program. That is, that those who oppose are in a weaker position than those who support it. Ideally, you would have the support of all of those who are in a position to advocate for the program and to give it as much credibility as is possible.

A description of how this was accomplished at FWL may help to give some reality to these abstractions.

FWL takes its directions from a Board of Directors drawn from universities, research centers and from the private and public sector from several western states. This board makes final decisions on allocations of funds, policies pertaining to all aspects of the operation of this research center. However, the issues that they deal with, that is, the agendas that are set before them are generally formulated by the top administrators at FWL.

Board members can also create their own agendas or modify those that are proposed, but the fact is that they do not know the day-to-day operation of the center, nor are they knowledgeable enough about the relationship of the center to its funding sources, i.e., Department of Education and private foundations, to propose agendas that deal with the most pertinent issues. What this means is that the real control is in the hands of the FWL administration.

FWL is a center which consists of over 30 relatively independent projects which obtain their funding directly from Washington or private foundations. Each Principal Investigator, Project Director, wields his or her own authority in hiring, supervising, policy-making, and implementing their project. The power that the administration has over project directors and other staff is that of supervision, some regulation of funding, and support for obtaining additional funding from funding sources, assignment to committee projects, and the power to give merit increases. This is a significant amount of control although on the surface of it, the project directors appear to be pretty independent within their own projects.

In some cases the control over the program budget is more direct, i.e., some projects are grouped and funded as a package, from NIE, for example. In this case the administration has the power to determine which programs will be cut to what percent and which will be increased. Although this is presented to the Board for final decisions, the real determination is made by those in power in the FWL administration.

There is an administrative coordinating committee, the Administration Council, which decides on fiscal matters and policy which effects the operation of the institution. This body consists of senior members, those who have been in FWL for more than eight years and those who run major projects and are handpicked by the Director and Deputy Director. Although this group makes decisions as a unit, the influence is primarily wielded by the Director and the Deputy Director. What this amounts to is that major decisions affecting the direction and operation of FWL are made by primarily two people, the Director and the Deputy Director.

Giving you this background was essential for you to see how the restructuring of the Women and Minorities Leadership Program changed its being a token program to becoming an effective internship model.

The motivation for starting the program was a requirement by NIE that the Laboratory have some visible program by which it promoted women and minorities into leadership or administrative positions. Money was offered to develop such a program and the decision was made by the Director and Associate Director to write a proposal to obtain such funds. The following people were assigned as a committee to conceptualize and develop the model:

1. The Director of Project STRIDE, a Black man in charge of a million dollar project in desegregation;

2. A Program Associate in the STRIDE project, a white woman who had been involved in women's issues for a number of years;

3. Associate Director of Follow-Through, a Black woman who assisted a white, male director of a program to serve low-income elementary school communities;

4. A Program Associate in the Follow-Through Program, a Mexican man;

5. The Personnel Director, a Black woman whose major work is selecting and hiring clerical staff;

6. A Director of a small project, an Asian man;

7. A Program Associate in a project to develop materials for Headstart, a Black woman; and

8. The assistant to the administration in the area of seeking funds and proposal writing, a white man.

Note that the only person with any power was the Director of the STRIDE Project and this was made by virtue of commanding a project funded for over a million dollars per year and supervising a staff of over twenty people. The rest were a cross-section of the minorities and women in positions of less than even middle-management.

This group of people formed the first Coordinating Council of the project. Although they were designated to make policy and to oversee the implementation of the program, the minimal credibility that this group had with the power structure also minimized the credibility of the program itself to the administration.

The program was provided only a part-time Project Director. The Director could spend only 25 percent of his time in coordination and development of the program. This was clearly inadequate. The program consequently drifted with insufficient direction until the interns and the council members leveled a complaint at the FWL administration.

The reasons that the interns and the Council could wield some power was because at the time affirmative action was a national issue for both women and minorities. The threat of the possible withdrawal of support on the part of women and the minorities at FWL could have meant withdrawal of the funds from the government agency and would force a new negotiation.

The result was the provision of 100 percent time for the Project Director and a new and more clearly

defined role for the Coordinating Council members as a policy-making and overseeing Board of Directors. The Council was further restructured to include two members from top administration, the Deputy Director, and the Senior Administrator, and a representative from the intern group. This restructuring made the performance of the Coordinating Council a serious and professional matter. When these people gave their time to develop or to monitor the progress of the program it was seen as serious effort. The presence of the Deputy Director helped to increase the attendance at meetings and insured that professional attention would be given to all the items on the agenda.

The restructuring of the Coordinating Council, the assigning of more authority to this body, and the provision of a full-time Project Director made it possible to develop an intern program that would really produce intern graduates having leadership potential.

SUMMARY OBSERVATIONS

The point that an internship program that is to work effectively must have the involvement and backing of those who wield power in the institution was discussed and then elaborated with an example. The example described an initial situation in which the administration was not sufficiently involved to make the program credible or viable. The change in the balance of power and the result of the involvement of influential administrators, interns, a Project Director with enough time devoted to the project, and defined roles then made it possible for the program to be effective and to be developed.

If you are from a school district or from private industry you simply need to identify the authorities and the sources of power within your structure, and to involve the key personnel in the planning, in the governing council, and to serve as resource people and mentors within the program. With their involvement will come their serious effort to make it an effective program.

Installation of the Program

THE COORDINATING COUNCIL

INTRODUCTION

Once you have assessed the need for an internship program and the receptiveness of the administration to such a means of advancing potential leaders, you need to be concerned with developing the foundation for it. This section describes the means by which to develop the governing council. This is a crucial step because this involvement of the key administrators is an initiation of their commitment to making the program effective.

PUTTING TOGETHER THE GOVERNING COUNCIL

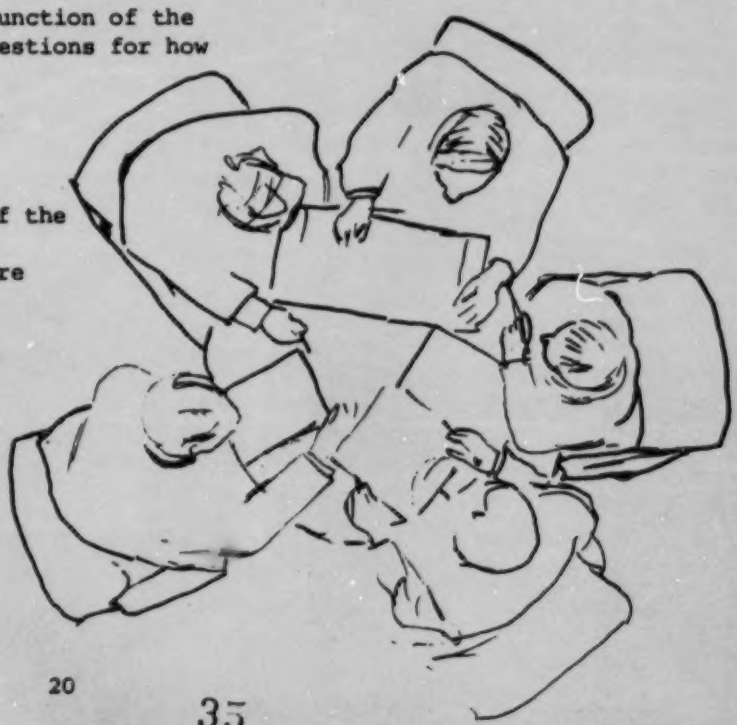
The previous section emphasized the importance of involving people who have influence in the institution in the program. This model provides three ways in which these individuals can be involved:

1. as members of the policy-making board;
2. as mentors or advisors to interns; and/or
3. as short-term consultants to interns.

This section describes the role and function of the coordinating body, together with suggestions for how to put one of these together.

INVOLVEMENT AT THE TOP

The director or chief administrator of the institution should be involved in the inception and creation of the structure for developing a leadership program. He or she should designate who will be responsible for the development of the project and should be involved in identifying who should be on the governing council. He or she will have more confidence in a committee made up of people whom she/he trusts. With the explicit support from this principal authority, possible in the form of delegating the assignment to you, you can proceed to organize a coordinating body for the program.



COMPOSITION AND SELECTION OF THE COUNCIL MEMBERS

The composition of the Council membership should be discussed and approved by the principal authority. The composition should include members who have experience as leaders themselves and who continue to have influence within the institution, e.g., the personnel directors, supervisors of a significant number of staff members or who themselves are members of policy-making groups within the institution.

At FWL, the composition was determined to be of seven members representative of all groups and constituencies within the laboratory with a special emphasis given to women and minorities. The persons who were to be laboratory regular employees in supervisory positions of middle management or higher.

CRITERIA FOR SELECTION OF COUNCIL MEMBERS

The basis on which the council members are to serve needs to be specified. It may be voluntary, or it may be by assignment from the higher administration. The qualifications for membership need to be spelled out.

The criteria outlined above was used for selection of council members who were knowledgeable about educational research and development. This was essential for the nature of this program but, in your case, you would need to devise your own outline for selecting those individuals who have demonstrated expertise and competence as managers and leaders in your field of work. In private industry, the criteria should serve to select those who are examples of capable executives and managers. In a school system, the criteria should enable you to select those who are competent school administrators and innovators within the system.

These were outlined in this project as follows:

All Council members serve on a voluntary basis. Any Regular full-time Exempt Employee (levels VI-Open) who has completed six months of continuous service with the Laboratory and wishes to be considered for membership may apply by making a request to the Project Director. The Laboratory Director shall have final approval of persons to serve on the Council. Members of the Council are collectively expected to reflect the following characteristics:

1. Keen sensitivity to and commitment to advancement of women and minorities which led to the funding of this program.

2. Thorough understanding of the range of talents available within the Laboratory.

3. Interest in, and/or experience with, staff development programs.

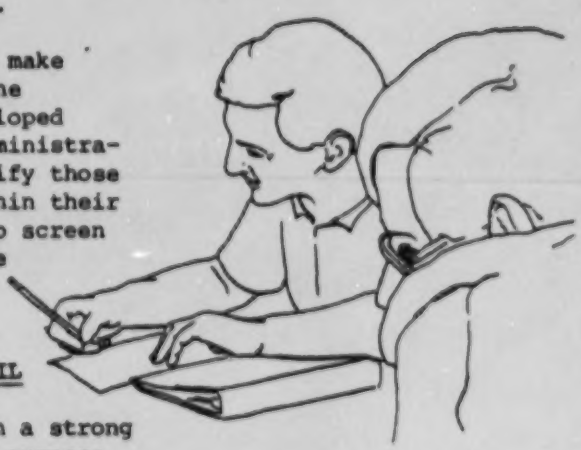
4. Knowledge of advancement within the Laboratory from lower position levels.

5. Experience in managing projects (or project components) in research, development, dissemination, and implementation (RDD&I).

6. Willingness to devote two to four hours per month to Council duties.

7. Willingness to work with a broad spectrum of colleagues of diverse backgrounds in setting goals and establishing policy.

The criteria need to reflect what is needed to make the program effective and the preferences of the administration. These criteria should be developed with or at least approved by members of top administration. This gives them an opportunity to identify those they consider as the capable professionals within their network as well as to give you the authority to screen those who may not have the credibility with the administration.



PURPOSE AND FUNCTION OF THE COORDINATING COUNCIL

In order for the coordinating group to begin on a strong footing, they should have a clear sense of the purpose and function they will serve. The following is the purpose outlined by the Coordinating Council at FWL.

> The Coordinating Council of the Women and Minorities Leadership/Management Training Program is established to perform two major functions:
>
> 1. to develop program policies and operating procedures;
>
> 2. to review and advise project management on the operation of the program.

The Council shall establish program policies and procedures as they pertain to:

1. criteria for the selection of program participants/interns;

2. establishment of advisory capability and mechanisms to support program participants/ interns;

3. communications with Laboratory management to ensure that program participants have equal access to opportunities for leadership/management experiences; and

4. ways to conduct periodic assessment of Program progress.

Furthermore, the Council shall review program progress and offer advice to program management regarding:

1. selection of participants on an annual basis;

2. determination of program content, i.e., management skills and opportunities for participants;

3. means of increasing program effectiveness or efficiency;

4. future plans for the program.

An initial meeting would easily be taken up with a discussion regarding the items in this outline. Through discussion, each member would become clear about what is asked of them and what they could contribute.

GUIDELINES FOR COUNCIL OPERATION

The group needs to know the number and frequency of meetings and the general method by which they will function to carry out the purpose described above. The following are the brief guidelines specified for this project:

1. The Council will hold regular scheduled meetings once a month (every first Tuesday of the month). A consent agenda will be prepared for each session by the Program staff. Any member of

this Council may request that a specific item of business be placed on the agenda. Otherwise, items will be proposed by the project staff, advisors, and program participants/ interns.

2. Unless otherwise specified, all meetings will be open to Laboratory staff. Learners and advisors will be encouraged to participate in Council meetings.

3. Policy matters will be decided by majority vote. A quorum for action will consist of any three members present and voting. In the event of a tie, the principal investigator may cast the deciding vote, or the matter may be deferred. Voting by proxy will not be permitted.

Although meetings may not always adhere to the guidelines, they do provide a means for the group to have a common understanding about what to expect from each other in these meetings.

DESIGNATION OF A CHAIRPERSON

There are many ways of selecting a chairperson for a group but all of them include the group's knowing what the chairperson's function would be. The following were the duties outlined for the Coordinating Council chairperson at FWL.

1. coordinating the efforts of the Council members to carry out the Council functions outlined above;

2. scheduling and conducting meetings of the Council;

3. communicating with the Director of the program and laboratory management on program issues and progress.

It is important that the chairperson be elected democratically by the group. This individual need not be in a power position within the institution. It may even be helpful that the person is not the most prominant in the group. This enables the most influential to participate and discuss from a peer position with the others in the group.

COORDINATING COUNCIL AGENDAS

The following list of agendas accompanied with a brief discussion is provided here to describe the extent to which the Council was involved in making the program effective. Note that the items on the agendas ranged from establishing criteria for selection of interns to specifying the requirements for graduation from the program.

DATE	PURPOSE	DISCUSSION
11/21/79	Selection criteria for internal and external interns. Decision regarding with which institutions to collaborate	1) Clarified eligibilty requirements and application procedures. 2) Established guidelines for recruiting external interns (e.g., minimal level in hierarchy of school districts from which to select interns). 3) Established that we must work with institutions who serve the largest proportion of women and minorities
1/7/80	Interview FWL intern applicants	Selected two interns from within FWL.
2/20/80	Progress report by Project Director Inclusion of Members from Oakland and SF on CC Selection criteria for external interns	1) Questions about (1) nature of relationship with SF and (2) effect of changed membership of CC 2) Recommended procedures for selection of interns 3) Recommendations from communicating information about the program in recruitment
3/20/80	Six FWL intern applicants interviewed	Three selected
4/25/80	Ten external applicants interviewed (7 from Oakland; 3 from SF)	Narrowed to 5 from Oakland; none from SF--decision to target recruiting to SF more rigorously.
5/22/80	Interviewed 5 Oakland applicants	Selected Oakland intern
6/13/80	Interviewed 5 SF applicants	Selected one to start June 25th.
7/2/80	Progress Report of Intern Activities by Project Director	Responded to progress report; discussed present system of internship completion; discussed need for procedu for certification of interns upon completing program requirements
8/28/80	Certification issues	Discussed intern concerns re: certification; based completion procedures on self-assessment instrument, accompanie by folio and resume. Recommended that CC review minimal competencies to appl to both internal and external interns. A committee assigned to reduce the competencies to fewer.
9/26/80	Committee meetings to evaluate competency requirements	Reviewed 80 management competency requirements to reduce their number
10/12/80	Second committee meeting	Determined means of evidence of competencies, i.e., the professional folio a revised resume, memorandum to the Council documenting completing requirements
*11/12/80	Committee recommendations for certification of interns completing the program	Questioned completeness of requirement combined competencies into 3 categorie rather than 4, requested further specification of competencies.

CONDUCT OF MEETINGS

Each meeting was called to order and adjourned by the chairperson and generally followed an informal version of Robert's Rules of Order. When the group worked as a team for developing criteria or defining the certification requirements, the formality was dropped and an open dialogue was conducted with guidance by the chairperson. A copy of the minutes of the meeting is provided here followed by a verbatim dialogue of the group meeting which produced the final certification requirements.

The transcript presented here illustrates the content and the method of interaction that takes place in a Coordinating Council meeting of the W&MLP and provides an example of the role of this body in determining policy.

This was the fourth and final meeting to detail the content and competency requirements made of interns in order for them to complete their work in the program.

The need for specific requirements was initiated by the Director of the Program with a submission of an outline of competencies based on a previous study of those skills required of project managers in R&D. (DeAnda, 1980). A subcommittee of the Coordinating Council subsequently reduced the number of these competencies and categorized them into areas that were similar to those required of Principal Investigators at FWL. The new set was submitted to the Coordinating Council and additional changes were recommended.

This meeting culminated the coordinated work of Director, Subcommittee and Coordinating Council members in the effort to specify the leadership certification rquirements. Lisa Hunter, the Chairperson of the Coordinating Council initiated discussion of the new set of requirements compiled and submitted by the Director of the Project.

DeAnda, Natividad, Ph.D. Competencies of Leaders and Managers in Educational Research and Development. San Francisco, CA 94103: Far West Laboratory, 1980. (Report No. 4, Independent Research and Development Project Reports, June 30, 1980.)

A COORDINATING COUNCIL MEETING

BACKGROUND TO THE MEETING

The meeting presented on the following pages was convened for the purpose of finalizing the completion requirements of interns in the program. This was the culmination of several meetings spanning a period of six months.

The purpose of the meeting was to define what interns have to demonstrate in order to graduate from the program. Completion requirements were originally based on a theoretical view of what interns in educational research should know. As the meeting progressed the requirements became more and more pragmatic and focused on the interns' knowledge of funding sources writing of technical proposals, and knowledge of the strategies and the politics for obtaining funding, and a knowledge of project management.

The meeting was opened by the Project Director presenting a summary of completion requirements which had been previously formulated by a Council committee, Project Director, the Coordinating Council Chairwoman, and another member of the Council who has extensive experience in educational R&D.

The Project Director reiterated the outline that the Coordinating Council members had produced at the last meeting. Four areas of competency requirements were outlined:

1. Program management which includes planning, supervision, monitoring tasks, and budget supervision.

2. Technical writing which includes conceptualization and writing of a proposal as well as technical reports and articles for publication.

3. Development of funding source expertise which means knowledge of funding sources, procedures for obtaining funds, and strategies for becoming part of the political network which facilitates obtaining funds.

4. Establishment of professional expertise which includes development and knowledge of a specific R&D content, an increase in credibility in the field, and obtaining a support network within FWL.

Competencies expected of principles and principle investigators in educational research at FWL were used as a basic outline from which to produce the areas of competence below.

Each of these four competency areas were being further refined in this Council meeting. A transcription of the discussion between council members follows the outline in order for you to note council's demand for practical competence. The dialogue between the members, while informal, was always on task and serious about defining the requirements.

AREAS OF COMPETENCE

Interns are expected to either already posses or further develop their professional competence in the following four areas:

1. Expertise Subject Area.

   The subject will demonstrate an adequate degree of expertise in an educational subject area. This would be demonstrated by evidence of credibility in the field, i.e., published articles, conference presentations, requests for consultation in the field. Another form of showing credibility will be by achievement through a degree from a recognized university.

2. Project Management.

   Evidence of being capable of managing a project or a significant portion of a project can be shown by previous experience as in the resume, letters of reference, or evidence on the job confirmed by supervisor or the intern's advisor. The areas of project management which are to be covered are:

   a. planning

   b. supervision

   c. task monitoring

   d. communications, i.e., quarterly or annual reports, memorandums, etc.

   e. budgeting

3. Technical Writing.

   Evidence of having been competent in writing a fundable proposal or a portion thereof, quarterly or annual reports, publishable articles, will be provided.

4. Funding Source Expertise.

   Evidence that an intern has knowledge of funding sources, procedures for obtaining funds from at least two agencies and the required procedures through FWL will be demonstrated.

   Furthermore, knowledge of the plitical strategies needed for assisting oneself in the funding procedure will be demonstrated.

PROCEDURE FOR SUBMITTING EVIDENCE

The intern's advisor and the director of the project will be principally responsible for evaluating an intern's progress and assisting the intern in producing the evidence of the intern's having acquired the knowledge and experience in the four described areas.

THE MEETING ITSELF

The Chairwoman, Lisa Hunter, opens the meeting and proceeds.

Lisa: What I wanted to do is have us finally finish with this so that whatever we decide here will be it. So, I would suggest that we go page by page and get the comments that you have and then cycle back and come to some consensus on what should be here.

What was your feeling on the first page, the suggestions? First of all, are there any questions that you have on how Nat arrived at this version?

Ralph: No questions here. I think it very much reiterates the planning meetings that we had regarding this. It's a very good perception of that.

Stan: Yeah, I have a question about it. Item 4 was the item we talked about before. (Item 4: Funding Source Expertise: "Evidence that an intern has knowledge of funding sources, procedures for obtaining funds from at least two agencies and the required procedures through FWL will be demonstrated. Furthermore, knowledge of the political strategies need for assisting oneself in the funding procedure will be demonstrated.")

Ralph: Of course now Item 4 has got to be a very difficult area to assess.

Nat: The means may not exist. We have to change the term strategies to knowledge of funding sources to simplify assessment.

Ralph: I'm fine with that.

Stan: Did some of you get a memo from John, actually

Stan: it's from Tate* to John?

Lisa: I did and I felt like saying, "So what's new?"

Stan: Yeah, but I thought that the things that were there in that letter to John may be the kinds of things that we should call to the attention of interns who are learning about funding sources. His recommendations and his talking about tips for submitting proposals to any of these agencies, federal or private. It hits the points that interns should be aware of. I was just thinking of that memo in regard to what we brought up before. The politics of funding are a little nebulous. It's hard to look at what the strategies are because they change so much. It's very hard to monitor that or show evidence that an intern really knows. My suggestion there is not to include it.

Lisa: Too political?

Stan: Yes, because how are we going to judge that somebody else's perception of strategies are going to yield results. Nobody has cornered the market on truth or ignorance regarding funding.

Lisa: My feeling is that it should stay in in some way because you tell, by discussion with the intern, whether they know the approach and who to approach. Maybe we can change knowledge to familiarity with political strategies or maybe not call it political strategies but call it ways of gaining entrance or getting credibility.

Comment: At this point the Council has reached agreement to include the requirements of interns knowing political strategies or methods of approaching funding sources.

The next section of discussion focused on detailing bits of information and knowledge that interns would need as well. Note that each Council member brings a fund of knowledge from their own experience.

*(The Tate letter described procedures which are more recently most effective for obtaining funds. The Council members were suggesting that knowledge of these procedures and others are an example of what interns should be aware of.)

Ralph: One of the things that we recently had a discussion about in our department and upstairs was the fact that the Laboratory has not used a lot of skills that people had around here. When being in Washington and visiting funding sources, we always came with the question, "Well, what do you need?" instead of coming to them with something we could do in the way of performing. It's been that we have received most of our money on the basis of competition for RFPs where other institutions of this type have gone there with prospectuses and said, "Here's what we're interested in." It seems to me that these interns that come out of this program should be very familiar with that type of approach. In order for this institution to survive, we're going to have to go with that type of approach rather than the other of hat in hand, saying, "What can we do for you?"

I think, for instance, it's not political but at least it's a strategy that one needs to know about. Interns should be privy to that type of process as they get PI status.

Stan: It's a two-way street. On the one hand, you need to go to places and say, "These are the kinds of things that we can do," before you can do them very well. The other part of it is also knowing what sources are available in agencies. Who are the people there? What are they currently interested in? What's bugging those agencies? What's their next cycle of things?

Ralph: That's right.

Stan: That may be two ways of explaining what we meant by political strategy.

Lisa: Okay, how would you word that then?

Stan: Item one under funding simply talks about knowledge of funding agencies and procedures which they abide by for procuring fundings, procuring contracts and procuring work. I think two could be the two sides of that thing: one is the knowledge and understanding of institutions relating to personal interest and capabilities and the other side is knowledge about key people in those agencies....

Lisa: Key people and possibly issues?

Stan: I call it the line of inquiry that agencies are concerned about. The Tate memo, one of issues that he mentioned which I think is very valid is that going for RFPs on a one-shot basis -- you go in, you win or you lose, right? But, in either case, you can build a relationship, even if you lose to know what the set of people are interested in, why they turned the project down, what's bothering them, what they want to have done so that even in losing, you might have already established a contact and be able to use that relationship to look for things that they might want to have done in the future. It gives you some entree into the system.

SUMMARY COMMENTS

The interaction describes that the Coordinating Council, made up of extensively experienced researchers in education, show their commitment to having a realistic set of expections for interns.

They freely interact, interjecting their opinions and showing evidence of their experience in the field.

They are committed to producing a set of requirements that they can endorse. Because it does come from their experience and their conviction of what is practical to know, their belief that the program will produce people who will have a place in R&D is more likely.

A committee of two members went beyond this meeting and finalized the requirements. They are presented on the following pages. Compare these with the ones that were introduced at the beginning of the meeting.

Whether you are from a school district or industry you, too, need to have council members who are practical and willing to work on the task of defining realistic requirements for your potential leaders.

You can image a dialogue that would take place between corporate managers and industry while in the process of specifying what potential management personnel would need to know in order to be competent as a leader. A concern in the private sector which would parallel that discussed above, of means of obtaining funding, might be the strategies for marketing new products or for obtaining funding for expanding production. A school

district may be concerned about obtaining funds from government and private funding sources for creating new programs or subsidizing those which are expanding. The basic skills of knowing the funding sources, the people to contact, and the strategies by which to best obtain the funds for expansion would be similar.

SELECTION OF A PROGRAM COORDINATOR

WHAT THE PROJECT DIRECTOR (COORDINATOR) DOES

The role of the Project Director, or coordinator of the program is a critical one to the success of the program. This person's principal job is to make sure that interns know the resources and are using them to their best advantage.

What this means is that the Project Director is a combination counselor, administrator, procurer and facilitator. This person must fill in the gaps that are made by deficiencies in the program or weaknesses in either the intern or the advisor.

Often, the Project Director is a mediator between the advisor or mentor and the intern. For example, the intern may not know how to best use what the advisor has to offer. The advisor may be an expert in a particular area but doesn't know how to teach or how to advise. This poses a dilemma for both people. The Project Director can talk individually to the advisor to assist in drawing out what the advisor has to offer.

In one instance, the advisor had extensive experience in writing proposals and technical articles. However, he was not able to give a supportive critique to the intern regarding her writing. He tended to be overly critical, as he was of his own work. This discouraged rather than supported the intern's efforts. To solve this problem the Project Director discussed the intern's potential with the advisor in a purely objective fashion. Together they identified the strengths and the weaknesses in the intern's writing and devised some steps for the intern to take to further develop her writing skills. The intern was to write rough drafts and select other people with writing experience to review and critique them. This left the advisor out of being in a negative position but allowed him to offer a constructive procedure for her to learn her craft.

This resolution of the problem was possible because the intern was able to talk to the Project Director about the difficulties with her advisor and the Project Director had the professional relationship and means by which to discuss the case with the advisor without threatening his role.

In other instances, the Project Director needs to know when to stay out of it. "It" here means the helping relationship that the advisor and intern develop for themselves. In another instance, the advisor was very active in recommending ways by which the intern could learn new skills and was assertive in creating those opportunities for him. The best approach to working with intern and advisor in this case was to meet with them periodically and to have them both take credit for the quality relationship they had by talking about the tasks they had agreed upon and were carrying out. An example of one of the tasks was that the advisor suggested that the intern write a mini-proposal in order for the intern to become known within the institution and to get the practice of writing a proposal for funding in a non-threatening situation.

This Project Director also has to be a politician, as well as a relatively accomplished professional in the field. The politician part involved his or her being able to effectively persuade other professionals who can serve as resource people to the program. Political acumen is also required in being able to work effectively with the governing council. This group is made up of individuals who see themselves as accomplished professionals in the field who need recognition of their status. They wish their opinions to be acknowledged and understood and put to good use in meetings. By respect is meant professional courtesy, such as providing them with materials and information that is needed to perform their function, to be given credit when it's due for helping the program work effectively.

Skill in orchestration of a variety of tasks is essential to coordinating an internship program. There are conferences and seminars which need to be catalogued and known about and evaluated, there are books to be selected for the library, there are experts in the field to be sought out and made available to the program, there are meetings of the Coordinating Council, meetings of interns, and individual meetings with both advisors, interns, and administrative staff. Clear and concise information between all of these individuals is the lifeblood of the program.

The Project Director must also be imaginative. He or she must be able to model the ingenuity for seeking or creating new opportunities and for using experiences on the job to develop the management and leadership skills. For example, an intern who had an educational materials developer job, was not in a position to

manage a project in the strict sense. An arrangement with that person's boss or director of that project, was made by which this person would be responsible for monitoring the budget for developmental tasks for the program for a period of a month. He began by outlining the scope of work for his own tasks and maintaining a record and account of time, use of materials, and costs for completing his tasks. He worked together with his supervisor in estimating costs and deadlines, not only for his own tasks, but for others within his project.

Imagination is also needed in assisting interns and advisors in their formulation of individual programs. Some interns work most effectively by working closely with consultants or resource people, others through coursework and others primarily by being left on their own to learn through trial and error.

Appropriate selection of the Project Director should come from knowing a person's experience in initiating, creating, working effectively with a variety of people, and having credibility both with administration and with individuals who would be interns in the program.

THE MENTOR

THE IMPORTANCE OF THE MENTOR

Mentor is defined as a person who provides a model, guidance, support and direction for her/his intern, student, apprentice. In the Renaissance days, young men and women associated themselves with a master craftsman by beginning in a menial position and ascending the ladder as they developed the skill and knowledge to equal their teacher. In those days the apprentice spent a significant portion of his/her life in the master's shop in order to learn the craft. This can be accomplished in a much shorter time in this program.

The similarity to an internship in this type of program is that the mentor can serve as a role model and is expected to guide and direct the intern. However, the difference between mentor and intern in terms of knowledge and skill is not as great as it was between master and apprentice. Nonetheless, the influence the mentor can have on an intern is one of the most important aspects of the program.

A few quotes from interns who have successfully completed the program will convey how important this relationship has been to some of the graduates.

> I had a run-in with a colleage and my advisor did a couple of things. He was very willing to listen to the difficulties that I was having and offer insight into the problem. He was able to give me some very sound insight into what I was going through either because he had gone through a similar situation or was speaking from experience. He gave me strategies for dealing with this particular situation. My advisor was always putting information on my desk and he suggested articles, handbooks, people I should call in my area who I might be able to talk to, and grants I might want to apply for.
>
> - An Intern

I used my advisor as a sounding board and someone to guide me. He provided me with contacts and suggested conferences for me to attend. I went to him with problems or sometimes I would have an idea and I would just bounce it off of him. Sometimes it was just really informal, "How are you doing? What's new?"

- An Intern

He was very supportive of anything that I was doing. He also suggested things for me to do. For example, he suggested that I see and find out what key people in FWL do. Sometimes I would mention something casually and he would help me formulate it into something more concrete. Once I said that I thought the Deputy Laboratory Director was very helpful in the meeting she held with the interns and he said, "Why don't you tell her that?" And I said, "You mean send her a memo?" And he said, "yes" and so I did. We discussed political strategies for advancement. He helped me to understand that I already had an area of expertise and that I had a network of professionals who already recognized me. This was a way of helping me to recognize my strong points in my field and that I already had a credible support system which I could use to my advantage.

- An Intern

The mentor role is an important one in this program, but it by no means is essential to all interns. Some have preferred to have minimal contact with their mentor and have, in fact, preferred to formulate their own directions and to learn from their mistakes as they went along. So, while the mentor has been important to most interns, there are exceptions who have done well without the guidance of one.

WHAT DOES THE MENTOR DO?

The role of the advisor is defined as follows:

1. To help an intern to plan, carry out, and evaluate an individualized and sequential career development program in leadership and management knowledge, skills and attitudes.

2. To communicate regularly with the intern

regarding his/her interests, accomplishments, delays, significant events, etc.

3. To help the intern select appropriate consultants, courses, or on-the-job experiences for each skill to be practiced and mastered.

4. To counsel the intern on methods of assessing progress in tangible, job-related functional settings.

5. To communicate information regarding the intern's activities and progress to the Project Director.

Each of the five functions will be briefly detailed in the following subsections.

Helping Interns to Plan, Carry-out and Evaluate Their Program. Planning begins with an assessment of the intern's professional strengths and weaknesses as a potential leader in her/his field. At FWL, they assessed the intern's experience and knowledge in areas of project management, knowledge of funding sources, technical writing, and of a specialized area of expertise in education. The two determined what the intern would need to learn and how to go about it. One intern, for example, had insufficient information and knowledge of identifying funding sources in Washington, D.C. He and his mentor created a plan about a source of funding for the project within which he worked. The second step in the plan was for the intern to accompany the mentor on a routine trip to Washington, D.C. to assist in seeking funds with several major agencies. The intern was required to summarize what funds might be available from what department and to recommend a direction and steps that his department could take to obtain additional funding. The two evaluated how much he learned from the sequenced experiences.

Regular Communication Regarding the Intern's Experience and Program. Mentor and intern need to be able to talk to each other with relative ease. The topics of the communication can vary from socializing to reviewing the intern's accomplishments. The program required at least one meeting a month for review of progress, but encouraged more as was needed.

Interns need to talk about the success of their efforts to complete certain assignments and/or about the frustrations they experience in dealing with situations or individuals. The opportunity for an intern to talk

about significant events in their professional life can serve as a means of taking credit and assimilating what they are learning. For example, one intern developed a problem with a peer on the job and asked for assistance in coping with the antagonism that was building between the two resulting from some differences of opinion regarding the credit they were due as co-authors of a teachers' handbook. Finding a reasonably amicable solution to this professional and interpersonal problem was a significant event for this intern. She gained the ability to cope with antagonism through direct but constructive confrontation and negotiation. Her self-confidence increased and she was able to apply the same courage and clarity in other professional relationships.

Assistance With the Selection of Human Resources, Courses and Experiences. The mentor, by virtue of being more experienced and more knowledgeable in the field, is in a position to help the intern to choose the kinds of learning experiences that will work best for her/him. This includes working on a short-term basis with a consultant, taking university courses, and/or on-the-job experiences. An intern may need exposure to basic knowledge through a course or a workshop followed by the opportunity to apply that in a job. For example, one intern developed her technical writing skill by rewriting the essence of a teachers' handbook for publication. The mentor suggested that she use a technical writing consultant to assist her with the rough draft, to consult with a person within FWL who is knowledgeable about publications for a publisher to whom to submit the article, and a fellow associate who knew her subject to give her feedback before submitting her work to the publisher. The article was published and the intern learned from each step of the experience.

Assessment of Progress. The real measure of progress is the product or the performance. It is not enough for an intern to be able to talk about what they have learned. The emphasis in this program has been to produce results. Both mentor and intern need to examine the mentor's tasks and jobs for means of evaluating new skills and knowledge. For example, an intern needing to develop budget management skills would manage the budget related to her own work for a period of a month. She was responsible for estimating costs of tasks to be performed in terms of labor and materials, and for evaluating whether or not she was staying within the budget. The means of evaluation was whether or not she estimated accurately and

whether her system for budget management worked as effectively as that of her supervisor.

At the end of the internship program interns in the FWL program must provide evidence in the form of a folio showing what they have produced or demonstrated in the areas of management, writing, knowledge of funding sources, and recognition in their field of expertise. The emphasis is always on being able to function effectively in their field.

Regular Communication With the Project Director. The mentor must be able to maintain an effective professional relationship with the Project Director since both of them are responsible for the intern's progress. What this means is that the mentor, being the Project Director's colleague and peer, needs to not allow competition or feelings that the intern is "answering to" the Project Director interfere with assisting the intern.

The mentor and the Project Director need to discuss the intern's strengths and weaknesses, the activities that he or she are engaged in, and to provide the best guidance that they can for this person.

The communications have been through regular meetings at least once quarterly, by telephone, and even informal exchanges on the elevator or in the hallways. Each person in the triad, mentor, intern and project director, is responsible for the intern's progress.

CRITERIA FOR SELECTION OF MENTORS

The following is the criteria that is used both by interns and by the governing council in the FWL program. The interns use these to select appropriate mentors for themselves and the Coordinating Council uses them to approve or disapprove of the intern's choice.

1. Advisors should have knowledge of resource persons in the laboratory and in the community who can serve as mentors for specific skills, knowledge areas, etc.

2. Advisors should have experience and skill in leadership and management, both theoretical and practical.

3. Advisors should be available to the intern to guide the learning and to work with the Coordinating Council and the Project Director.

4. Advisors should be willing to help in the development of a leadership and management training program.

In addition, it would be desirable for advisors to have 1) experience in staff development and/or counseling; 2) sensitivity in assessing needs; 3) ability to analyze interns' strengths and weaknesses; and 4) commitment to program goals.

The guidelines seem fairly clear and become more so when individual mentors are discussed by a group of peers who know them.

SUMMARY

The Application To Industry and School Districts

Mentors in the private sector or in a school district need to be selected for their expertise in their field of management. They should be knowledgeable about management in the industry or in administration of schools respectively.

The criteria to be used for selecting the mentors would need to be formulated by the governing council. It is assumed that those who can best model as leaders will be selected.

SELECTION OF INTERNS

THE PROGRAM IS ONLY AS GOOD AS THE PEOPLE IN IT

Our experience in conducting this program showed that personality characteristics, i.e., assertiveness, competence, intelligence, and clarity of mind coupled with evidence of the ability to lead in their work experience were the best predictors of success. The kind of education or the degrees obtained by the person were not as important.

The problem you're faced with is what procedure to use to insure choosing those who have the best chance of being successful.

Our experience shows that the selection committee must be used for the benefit of having several viewpoints. The selection committee must know the criteria for choosing the best applicants and the procedure must enable them to see evidence of the applicant's leadership potential. In this program, the evidence was available in the applicant's request and in their performance in the interview with the committee. The request for entry into the program required the applicants to answer six probing questions and the live interviews gave the applicants a chance to demonstrate their competence in dealing with people, presenting their viewpoints clearly and to demonstrate their self-confidence as potential administrators.

This section contains the criteria that were used for selection, the requirements for self-evaluation and the agreement or contract that the applicant made with the program to perform as required.

PREREQUISITES TO ENTER THE PROGRAM AND EVIDENCE OF LEADERSHIP POTENTIAL

An important source of leadership potential is shown by the applicant's ability to assess themselves. The strength of their character and their ability to identify why they are leadership material shows in requiring them to justify their application.

The following is a copy of the announcement which applicants review before submitting their request for an internship:

REQUEST FOR MANAGEMENT INTERNS

The internship program is open to those staff persons in programmatic research and development whose scope of work consists of tasks directly related to educational R&D (such as produce development, training, evaluation, dissemination), and which are not primarily administrative in nature.

Applicants must meet the following educational and professional requirements:

1. They must have been employed for at least six months at FWL in a permanent position, and must be at least half-time employees.

2. They must have completed an MA or be able to provide evidence of equivalent knowledge through experience. They must have already developed, or could easily develop an expertise area; they could be eligible to enter a doctoral program.

3. They must have demonstrated the capability for leadership and management by having initiated their ideas within their job, and/or by organizing or managing community action movements.

4. They must have written documents showing their ability to write technical reports and materials.

5. They must be concerned with and have made efforts toward advancing themselves professionally, i.e., continued education, professional seminars, taking advantage of opportunities in their job, etc.

The importance of each of these are discussed below.

<u>They must be employed in a field related to the Internship Program</u>. The interns must have the opportunity to apply what they learn in seminars, conferences, readings or coursework in their actual work. Needless to say, their job must be in the field within which they aspire to be leaders. In the case of FWL's

interns, they were required to be working in the field of education and preferably in a job which allowed for innovation or research.

Educational Requirements. Notice that a degree at the master's level was stated but not required. The equivalent knowledge obtained through practice in the field was as, if not more, important than the actual degree. The feature that was more important was that they had made the effort to develop themselves in a field of expertise, either through academic study or in the field experience.

The evidence regarding the effectiveness of education in producing outstanding achievers in the field is questionable. There is evidence that the truly outstanding people tend to drop out of the dull, academic routes that are provided by universities. On the other hand, those who do not have the talent also tend to drop out. So you cannot entirely rely on academic achievement as an indicator of leadership potential by itself.

Demonstrated capability of leadership. This requirement is probably the most important of the five.

The applicant's capability for leadership must be evidenced in her/his work history and education.

Here is an example of one intern's work statement which indicates demonstrated leadership.

PROFESSIONAL BACKGROUND

Administration

Currently directing national Continuing Education technical assistance contract for U.S. Department of Education. Responsible for overall administration, development and field testing of project materials, planning and conduct of administrative training workshops, and initiation of liaison activities with Higher and Continuing Education professional associations.

Coordinated national planning contract for U.S. Department of Education to determine staff development and program information needs of Continuing Education professionals. Responsibilities included supervising researchers, writers, graphic artists, and support staff; developing bimonthly information bulletins;

researching and producing booklets on successful programs; developing and conducting national briefings; and maintaining a wide range of contacts in the Continuing Education field.

Administered social service agency for five-city area. Responsibilities included creation of staff and volunteer training programs; development of an inter-agency human services information dissemination system for the Greater Boston Area; recruiting and training staff.

Created and directed public speaking committee for community organization. Created network of medical consumer self-help groups for the New England Area. Trained and supervised volunteer staff.

Co-founded and managed independent Boston-area news journal. Responsibilities included overall administration of editorial matters and production; development of a publicity and dissemination network; design and administration of marketing evaluation procedures; assignment and supervision of reporters.

Coordinated and expanded Community Service Curriculum for 250 public schools. Recruited, trained, and supervised youth and adult staff.

Directed social service agency camp. Responsibilities included publicity, creation of promotional brochures, program design, administration, staff hiring, training, supervision, and evaluation. Upgraded safety procedures; increased enrollment 25%.

Training

Designed and conducted development institute for adult education teachers in Federal Region IX (California, Nevada, Arizona, Hawaii, Guam, American Samoa, Micronesia, and the Trust Territories) focused on innovative techniques for teaching English as a Second Language, Adult Basic Education, and teaching in a multicultural environment. Responsible for production of materials and evaluation.

As part of a national team, designed and implemented staff and member workshops and conferences for social service agencies in the East and Midwest. Created all training modules. Module topics included: client needs assessment, program development, fiscal management, creative use of conflict, decision making, creating information systems, and planning staff development.

Conducted inservice training for reporters in research and interview techniques.

Conducted workshops on effective reporting, research and interview techniques.

Conducted workshops on effective reporting, research, recruitment of volunteers, and information networking as delegate to National Print Conference.

Planned and conducted training for staff of university women's center.

Planned and wrote curriculum for family health courses of community health center; trained family health teachers.

Taught seventh, eighth and twelfth-grade English and Women's Studies in public school; coordinated volunteer teacher aide services.

Writing

Edited national bimonthly Continuing Education bulletin focusing on successful programming, staff development, administrative developments. Contributed to monthly project reports and final recommendations to U.S. Department of Education.

Created curriculum materials for professional development and community service programs for public schools.

Wrote program services booklet for social service agency to be submitted to the United Way for funding determination.

Designed and wrote copy for social service agency promotional brochures.

Edited monthly newsletter for social service agency and community organizations.

Organized written documentation for National Print Conference, Omaha, NE, and Violence Against Women Conference, San Francisco, CA

Developed program scripts for weekly radio show on WBZ/FM, Boston, MA.

Developed proposal that obtained funding for news journal and community action group.

POSITIONS HELD

Project Director, CETAC (Continuing Education and Technical Assistance Center), Far West Laboratory for Educational Research and Development, San Francisco, CA.

Consultant, Region IX Adult Education Consortium, Far West Laboratory for Educational Research and Development, San Francisco, CA.

Program Consultant, American National Red Cross, Burlingame, CA.

Administrator/Staff Liaison, Women's Center San Francisco, State University, San Francisco, CA.

District Director, (administration and staff development) Camp Fire Girls, Hingham, MA.

National Trainer, (program development and training) Camp Fire Girls, Denver, CO.

Executive Manager, Sister Courage Newsjournal, Boston, MA.

Teacher - seventh, eighth and twelfth-grade English and Women's Studies, Millis, MA.

Assistant Marketing Manager, G.K. Hall Publishing Co., Boston, MA.

EDUCATION

M.A. Candidate in Interdisciplinary Education, San Francisco State University, San Francisco, CA. Specializing in development of educational programs for adults.

B.A. English and Political Science, Regis College, Weston, MA.

Exchange Program in English Literature and History, University of London, London, England.

World Literature Program, University of Massachusetts, Amherst, MA.

TEACHING CREDENTIALS

Massachusetts, Secondary in English and Social Studies.

California, Adult Designated Subjects, Lifetime Clear in English; Social Studies and Women's Studies.

California, (Candidate) in Secondary English and Social Studies.

Note that this individual organized and directed a newspaper, co-managed a community health center and social service agency and was currently managing a dissemination project for FWL.

This person did not have a master's degree but clearly showed leadership capability and experience that was easily equivalent to that academic degree, if not more.

Technical writing ability. In the field of educational research, technical writing is a must. The development of writing skills takes much time and practice. In an internship program which provides at most 18 months training and experience, the individual has to be free to attend to the more critical aspects of leadership training, i.e., management, political strategies, and development of credibility in the field.

Demonstrated efforts towards professional advancement. This requirement is related to the capability for leadership. The same examples that you read under that section would apply here. Essentially, this requirement is that the person be assertive and initiating enough to seek new opportunities or to create them. Again, look at the person's resume of experience for evidence that the person has not chosen a path which has indefinitely placed him or her in a subservient role.

INTERNS' SELF-EVALUATION AS A REQUIREMENT

The Applicant's Actual Request The following is an example of the directive that is given to applicants. They are expected to provide the information that is asked for and to follow the directions stated.

This is essentially the format for their request to become management interns.

> Write a memo of intent to the Director of the Internship Program, stating:
>
> 1. What is your previous experience, and how does it indicate initiative and potential for assuming a leadership role?
>
> 2. What are your professional goals?
>
> 3. How do you think the Women and Minorities Program might facilitate your attaining the skills necessary to reach your professional goals?

4. What do you think you might contribute to the program?

5. Choose a FWL project or component director who would be willing to serve as your Senior Advisor, and briefly state your reasons for this choice.

6. Attach your current resume.

Requiring the potential interns to state their case forces them to show how much credit they take for what they have done for themselves professionally. Their writing also demonstrates the clarity with which they are pursuing professional goals. The ideal applicant would know to what extent he or she has advanced him or herself and what he or she has to offer the program.

Statement of Previous Experience. The applicant's ability to state their previous experience with clarity and self-credit indicates the potential for leadership. It reflects confidence, clarity about their success in previous work and the implications for their future potential in their field.

> I was hired as Project Coordinator for the Continuing Education Technical Assistance Center in January 1979, and after demonstration of competency was moved to the role of Project Director. In the second year of the CETAC contract, the principal investigator is operating in a minor advisory role, and I am fully responsible for all project operations. Activities of the present contract include: planning and conducting two workshops on program evaluation for state Title I (HEA) administrators; conducting four regional workshops for deans and directors of Continuing Education on program marketing; field testing criteria for identifying successful Continuing Education programs; producing further issues of the bimonthly CETAC BRIEFS, expanding the number of programs covered in each issue; updating the Community Services and Continuing Education Program brochure; establishing liaison activities with selected dissemination agencies and Higher and Continuing Education associations; and researching four booklets about successful Community Education programs in the areas of: Women; Minorities; Handicapped and Alternative Energy Sources.

I am responsible for a budget of $164,000, including a $39,250 contract with the National University Extension Association; supervision of one full-time administrative assistant, one part-time clerical assistant, writers, editors, and consultants.

I have also increased field visibility for the Laboratory, on my own initiative, by participating in a number of conferences. Meetings at which I made presentations included the annual meetings of the National Adult Education Association, the World Future Society, California Community Colleges Continuing Education Association, and the California Community Colleges Services Assocation. I also participated in the National Networking Seminar sponsored by Northwest Regional Laboratory and the annual meeting of the American Educational Research Assocation.

Prior to my association with FWL, I taught public school, created and managed a newspaper and co-managed a community health center and social service agency, as noted in my resume.

Professional Goals. The applicant's ability to state goals in a clear manner demonstrates ambition, foresight, and clarity about her future in the field. The following is a sample taken from an application to this program:

- Complete the CETAC project:
  - producing required deliverables and making final recommendations to the U.S. Department of Education on technical assistance and information needs in Continuing Education,
  - seeking continuation and additional funding as appropriate;
- Become principal investigator in a Futures Invention Civic Literacy project:
  - helping older community women to become involved in shaping the future,
  - combining my experience in planning adult programs, assessing programs for older adults and research in futurism; or seeking

funding for another project in adult or continuing education;

- Broaden professional contacts with higher education associations - particularly as a panel member at the Meeting of the American Association of State Colleges and Universities;

  - offering workshops at the Third Annual Meeting of the World Future Society.

  - exploring opportunities to work cooperatively on projects with professional Higher and Continuing Education associations;

- Expand contacts within the Laboratory:

  - tapping in-house resources and skills,

  - consulting to other Laboratory contracts that could use my expertise;

- Hold a public forum on Future Projections in Education co-sponsored with the University of San Francisco:

  - provide increased community visibility for the Laboratory;

- Complete a Master's degree in Interdisciplinary Education:

  - specializing in creating learning opportunities for adults;

- Participate in the Women and Minorities Leadership/Training Program.

These professional goals show that the applicant plans to work on her career development from a number of different angles and that she mentions here both long-range career goals and immediate specific actions that she will take.

Ability to Give and Take. Given next is an example of how one applicant to the W&MLP responded to the questions about how the program would facilitate her attainment of her goals and what she could contribute to the program.

"While I have published various articles of social and political interest, my R&D publications are limited to those indicated on the attached page. Thus, I would like to work with Paul Hood and Bela Banathy in conceptualizing and completing research documents. I also hope to work with Paul Hood and Paul Christensen in conducting a formal project evaluation. In general, I see the active participation in this in-house program as an opportunity to work more closely with Laboratory staff.

Because of my varied professional background, I would come to the program with skills in training, publishing, management, and group dynamics. I have worked both in hierarchies and in alternative collective structures.

At a local university, I was part of a mediation team that dealt with administrative/faculty and students disputes and have contributed to developing techniques in futures forecasting.

The fact that the Internship Program is still developing is important to me. I am interested not only in creating my own learning plan but also in sharing my varied skills with other program participants."

This applicant is very specific about how she will use the program and is confident that she has something to offer to other interns.

Selection of an Advisor and/or Mentor. An intern shows initiative in seeking an appropriate mentor for her/himself. Those who are shy or diffident about asking someone to work with them over a period of time already show a weakness in being able to assert themselves. Their being able to ask another person to become a professional mentor takes courage which is derived from self-confidence.

The other aspect that is evaluated is the applicant's reasons for selection of an advisor. This is related to the applicant's ability to make an appropriate self-assessment. They need to select someone with whom they can develop a professional relationship based on mutual respect, and who can help them assess their strengths and weaknesses. Finally their selection needs to indicate some awareness of the advantage they have in working with their chosen senior advisor. Those who choose someone in a position of influence are more likely to

be recommended for new positions or opportunities. The applicant's awareness of strategies for advancing themselves is one of the more subtle criterion which needs to be examined by the selection committee.

AGREEMENT TO COOPERATE IN THE INTERNSHIP PROGRAM

The potential interns need to know what they are getting into. The following is a brief statement of what is expected of them once they become interns. This helps to make clear that they are expected to work in a teamwork relationship with other interns and that the program is not simply a means by which they can get tuition for coursework and conferences.

Applicants must be willing to adhere to the following program requirements:

1. They must attend regular meetings.
2. They must formulate an individual program of learning to include self-assessment and working with advisors.
3. They must complete documentation of progress.
4. They must work cooperatively with other interns by sharing their efforts to formulate their individual programs and methods of learning.
5. They must have the approval of the PI or project component director to adjust their scope of work to include program participation.

SUMMARY

This section has provided you with a step-by-step guidance through the procedure by which an applicant makes known that they want to be a management intern. In the comments following each of the subsections, observations are made to indicate what the committee looks for as evidence of leadership potential.

If your institution is in the private sector, you would only need to translate the requirements to those that apply to your business. For example, the area of professional goals, a corporation management intern might indicate that their goal is to develop

expertise in writing for an expanding market which may include the use of foreign countries as a source of labor for production.

This same person's resume could be examined for evidence of having contributed to his company's improvement in production or marketing by developing a special project or working with an assistant to someone who is already a successful manager.

Similar examples can be made for evaluating a potential administrator within a school system. He would simply translate the requirements and evidence into those which apply to school principals or administrators. For example, a teacher who undertook coordinating a special program for educating parents on a schoolwide basis would have demonstrated the ability to coordinate the efforts of other teachers, materials, contact with parents, and administer the successful conduct of such a program.

The Program in Effect

HOW AN INTERN PLANS

PREFACE

Planning is the means by which an intern can be clear about short-term goals. It not only is a means by which to enable the mentor and the intern to communicate with each other, but gives the intern a basic management practice, managing him/herself by specifying objectives, resources, and steps to achieve those objectives.

In this section, an outline of the areas of skills and knowledge which interns have to acquire is presented, an actual dialogue between mentor and intern to exemplify the process of determining objectives, and examples of actual plans which outline goals, activities, resources and methods of assessing them and how they are accomplished.

WHAT HAS TO BE LEARNED

The intern should know from the beginning what she/he needs to be able to demonstrate by the end of the program in order to be certified as having successfully completed leadership training. At FWL, the following areas were designated as competencies required for graduation from the W&MLP.

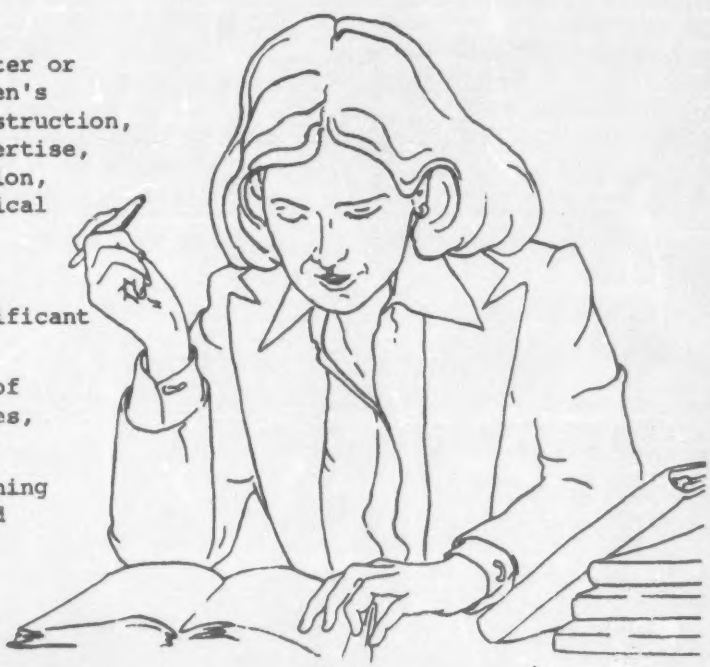
1. Area of Expertise
   Knowledge of specific subject matter or issue expertise, for example, women's equity, desegregation, reading instruction, bilingual education; or skill expertise, for example, research and evaluation, dissemination, development, technical assistance.

2. Project Management
   Management of a project or a significant portion of a project, including:

   a. planning: determining scope of work, defining tasks, schedules, personnel and resources.

   b. supervision: defining, assigning and monitoring staff roles and responsibilities.

   c. communications and reporting:



c. informing progress and outcomes of projects to staff, funding agencies, community and clients.

d. budgeting: planning, justifying and monitoring project costs.

3. Technical Writing
Preparation of a readable, technically sound document suitable for its intended audience, such as funding agency, lay audience, parent group, journal reader, advisory board.

4. Grantsmanship
Knowledge of appropriate funding sources, strategies for obtaining funds from private, state and federal agencies.

It is the intern's job, together with her/his advisor, to review these requirements and to ask her/himself: "How much of this knowledge and skill do I already have?" and "What evidence do I have to show that I don't need to relearn this?"

With these two basic questions, the advisor and intern are then in a position to assess what areas of knowledge and strength the intern already has and which are those that would need to be developed through a program of activities.

THE ADVISOR AND THE INTERN WORK TOGETHER

The advisor and intern are free to meet as often as they like, but one required time is at the beginning of each quarter. This is called "quarterly planning" and is intended to give each of them the opportunity to agree on what the intern needs to work on and how she/he will work on it. Two examples are provided here to give you the opportunity to compare the content of each intern's quarterly plans with one another. The first includes the dialogue between advisor and intern to give you an idea of how they arrived at the subject on which the intern would concentrate for that quarter. This is followed with the actual outline of the plan which is submitted to the project director on the form that you will see.

The dialogue between Barbara and her mentor, Betty Ward, that you will see below shows the steps in the discussion that they took to review Barbara's previous experience and already developed skills. This description of the exchange between them shows the process of

assessment, identification of resources and the final narrowing down of the choices which leads to Barbara's writing her quarterly plan.

Betty: Before we talk about what you might do in this quarter let's look at what your qualifications are now for being a principal investigator here in the Laboratory (a PI is a designation which authorizes a person to write grants and proposals for funding and to direct projects).

Barbara: What are those requirements?

Betty: You have to have an MA or an equivalent in experience, previous management experience, experience in writing proposals, and an area of expertise. Let's look at your resume and then you tell me which of the qualifications you can meet already.

Barbara: Management experience I have a lot of. I directed a newspaper project in Boston, I coordinated social services agencies and I'm now in charge of coordinating and directing all of the functions of CETAC. (pause) Educationally, I have all the coursework done for the MA and have written an outline for my thesis so I don't have the MA but I have eight years of experience in education and of working in innovative projects in education. Does that or would that meet the requirement?

Betty: Yes, I think you're all right there and the management experience seems to be adequate even though it's not in the field of research and development directly.

Barbara: Areas of expertise (pause) ... I have an area of expertise in continuing education but I'm not quite sure that that's what I want to do in the long range. I'm interested now in futures planning and I know that I want to work with community but I'm not sure in what area.

Betty: Well, I think that you will have to make up your mind before you complete your internship. But I think that can wait and may take a little more time. How are you in the writing area?

Barbara: Most of what I do now in CETAC is writing. I publish a newsletter, and if you recall I directed the project for a newspaper. But I don't know proposal writing. I helped a little in the writing of the current project proposal but I don't know that I could write a whole proposal right now without more experience.

Betty: Well, I think the fact that you are directing a project now and doing exceptionally well with it makes it clear that you're capable of the management even though you don't have a large staff. What it says is that you do get the tasks completed and you know how to set your timelines and to maintain the coordination with all of those sites in order to publish your newsletter. I think you should concentrate on the proposal writing. If you are going to become a PI or a manager of any kind, especially in R&D, you will need to be able to write a proposal or definitely know how to conceptualize it in order to direct others who may write portions of it. Is working on proposal writing something you think you want to do at this time?

Barbara: To tell you the truth, it scares me but I might as well start now, but with the idea of producing an outline and not a full-blown proposal.

Betty: How do you want to go about this?

Barbara: Well, the first person I think of is Chesca who works in Lisa's program in training others in proposal writing. She's also an intern and I would like to figure out a way of working with her to learn about proposal writing. I also know that there are workshops that are given outside of the Laboratory in proposal writing, and I understand the grantsmanship center has a four-day concentrated workshop that is said to be pretty good.

Betty: Why not the workshops that are provided by the Laboratory by Lisa's project?

Barbara: But those are given in other parts of the country right now and there aren't any immediately being given around here and besides that, I think I need more than two

days. I've talked to people who have taken the two days and unless the person is already pretty well versed in proposal writing, it takes more than that to really get the feel for writing proposals.

Betty: Well, I can understand that. Maybe you can work out some individual contacts with Chesca in the course of the quarter.

Barbara: That's what I had in mind. What I think I would like to do is to talk to Nat (Project Director for the W&MLP) and see what he recommends in terms of conferences or experiences that are offered for proposal writing. Specifically, I'll ask him what he knows about the grantsmanship center workshops. And I think I would want some time to play around with writing a proposal outline and then attend the week-long workshop later. Then to see what I have and then to arrange to meet with other people to go forward with it.

Betty: Sounds like a pretty good sequence. I suggest that after you get to the point where you feel the outline seems like a good one to you, I'd be glad to review it and give you my comments. In the meantime, you might work with Chesca on the development of, and/or other people who are experienced in proposal-writing here at the Laboratory.

Barbara: Who might that be? I can think of a couple - Matilda Butler and George Rusteika.

Betty: Yes, Matilda's quite good, and I would add to check the evaluation part of your outline with Bob Spots and Bob Peterson.

Barbara subsequently wrote and submitted her quarterly plan. This is formatted, as you will see, in terms of the goals for the quarter, the activities, resources, timelines and methods of evaluation results.

GOALS	ACTIVITIES	RESOURCES	EVIDENCE OF GOAL ACCOMPLISHMENT	TIME TABLE	METHOD OF EVALUATION
Develop expertise in proposal writing	Write preliminary proposal outline	Developing successful proposals in women's educational equity	Outline begins	July 11	Advisor review
	Attend grantsmanship workshop	Staff; materials; participants	Outline of proposal completed	July 28 - August 1	Advisor review
	Meet with Laboratory Deputy Director to refine outline	Deputy Director and materials of her office	Comments on outline received	August 6	Project Director review
	Meet with Chasca Plume to further refine body of proposal	WEEPUP materials and staff	Comments received	August 12	Advisor review
	Receive comments from PWL staff	Matilda Butler, Bob Spotts, Bob Peterson, George Reinelts	Comments received	August 6-18	Advisor review

BARBARA'S QUARTERLY PLAN

GOALS	ACTIVITIES	RESOURCES	EVIDENCE OF GOAL ACCOMPLISHMENT	TIME TABLE	METHOD OF EVALUATION
To increase familiarity with budget management	Read selected materials on budget management. Identify key issues raised in these readings regarding how best to develop a project budget.	Women's educational equity development materials PWL Library SFUSD Library Stan Schainker	Written listing of books and materials read and key issues raised	11/30/80	Conference with Advisor
	Review of an existing in-house, mini-proposal and develop a supporting budget for it.	A selected mini-proposal Marion Laetz Stan Schainker	Written budget submitted with back-up information needed to understand it.	12/15/80	Conference with Advisor Comparison of proposed budget with actual budget.
To increase skill and knowledge in areas of expertise	1. Attend conference on the neurologically handicapped	Class for the neurologically handicapped	Written summary of major subjects	11/30/80	Conference with Advisor
	2. Attend mini-workshop on learning a second Language	CATESOL, Bay Area Chapter	" "	" "	" "
	3. Attend hearings on Law regulations	U.S. Office of Education, San Francisco	" "	" "	" "
To explore continuation of graduate school work	Contact and evaluate various graduate programs	Nat DeAnda Stan Schainker	Application completed and submitted to institutions selected.	1/15/82	Conference With Advisor

MINERVA'S QUARTERLY PLAN

Minerva had already reviewed her experience and skills with Stan Schainker, her advisor, and the two had determined that her experience as an assistant principal had given her the management skills, her having published several articles in professional journals aptly demonstrated her writing skill and that she had developed two areas of expertise but needed rounding out in experience in budget management and in choosing an area of expertise in which she could be known in her field. Other subject areas in which she needed further development were proposal writing and knowledge of funding sources.

They decided that she would first round out her management experience and explore both areas of expertise in order to decide which one to develop further, either special education for the handicapped or bilingual education for the Hispanic student.

Her quarterly plan shows the three goals and the means by which she will develop further knowledge of the skills.

COMPARATIVE OBSERVATIONS

Note that Minerva identified three goals to Barbara's one. The number does not matter. What does matter is that the activities and resources are complete enough to help the intern learn what she needed. Both combine learning from participating in conferences with working directly with other individuals, i.e., resource people from FWL. Barbara includes getting assistance from a fellow intern, Chesca, who has expertise in proposal writing.

One of Minerva's activities for learning budget management is an analysis of the internship program budget which includes funding of her own internship. Examining a budget which includes her makes the experience more meaningful in that she is familiar with the nature of the program and can make more associations when examining the whys and wherefores of the allocation of money within the project.

WHAT HAPPENS AFTER THIS?

The interns are on their own to make arrangements with the help of the project director for attending conferences, for getting further information on particular subjects from the research library, and for obtaining the needed funds for travel or for payment of tuitions. They are primarily on their own to complete the activities and to schedule further meetings with the advisor or project director. Some interns learn best by frequent contacts, i.e., half hour to hourly meetings twice a week and others prefer to meet with their advisor only when it is required, i.e., quarterly planning and review meetings.

INTERN MEETINGS

PURPOSE

Intern meetings are held once a month for the purpose of keeping the membership informed of current events, i.e., new funding, legislation which effects direction or research, for discussion of concerns interns may have about conferences, training requirements, or decisions which will be made by the coordinating council which affect them. While these business items are agenda issues that have to be dealt with on a regular basis, the most important reason for having intern meetings is to enable each of them to learn and give support to each other. As you saw from the previous section, each develops their own individual plan and proceeds on their own with it. Although some include working with each other as a means for their developing skills, most tend to work individually, and in isolation.

NATURE OF THE MEETINGS

Each intern is encouraged to bring up issues or concerns or reports that pertain to their training. In doing so each of them has a chance to take credit for their accomplishments, and to give ideas to other interns regarding how they might acquire new leadership skills. They learn from each other how to use resources, how to figure out the political strategies for working effectively within a given situation and about sources of information that they can use.

The best outcome for these meetings is that each of them find ease in seeking each other out outside of meetings to help themselves and that they use the meetings as a forum for learning how to cope with problems in their job and for rising above the problems and assuming control of the situation.

USE OF MEETINGS FOR SUPPORT AND CLARIFICATION

Often an intern would complain about the limitations that their supervisor placed on them by delegating

a job to them without the authority to use their resources. One intern used a meeting to discuss what she could do to cope with a task that was assigned to her. She described to the group that she had been assigned the task to head a group of four professional peers in the production of a position paper. The problem arose from the fact that while she was given responsibility to head this group, she would receive no backing from her supervisor when some members failed to turn in their portion of the written materials according to deadlines. The group helped her analyze the politics of the situation, that some in her assigned group had a special and personal relationship to her boss which gave them more authority than she had. They helped her to see that she was in a bind, that is, that she either did all the work herself or suffered the consequences of challenging these friends of her boss for failing to meet their responsibility. She was essentially given responsibility without the authority. She learned that there is designated power and there is existential power. She was designated as the head of the group, but in fact, those in the group had more power than she by virtue of their relationship to her boss. Confronting them would have cost her suffering subtle harrassment and ostracism.

WHAT IS DONE IN INTERN MEETINGS, SOME EXAMPLES

Minutes of actual meetings are presented on the following pages. This particular meeting is an example of a workshop on the subject of sources of funding in federal government and from private foundations. The second in command of Far West Laboratory, Betty Ward, gave of her expertise regarding the nature of funding sources and what it takes to solicit proposal funds. An intern, Chesca Piuma, also presented information on the sources for learning about the kinds of proposals that are being funded. Chesca's expertise was acquired in her job as a trainer on the subject of writing successful proposals for women's equity projects.

WOMEN & MINORITIES LEADERSHIP PROGRAM

INTERNS MEETING June 6, 1980

Present: Nat, Fran, Amalia, Chesca, Barbara, Davida, Joaquin, Elsie Sandra, Alma.

Nat introduced Alma Williams, the new intern from the Oakland school district. An evaluation specialist, Alma was selected from eleven applicants 23 May, 1980.

Since the purpose of the meeting was to obtain information on sources and politics of funding, Nat gave a brief overview of the origin of the women and minorities program.

Chesca then presented information on how the government solicits for funds, and what is involved in responding to requests for funding. Distinguishing between grants and contracts, Chesca listed information sources pertinent to each, and briefly described the usefulness of the documents cited:. Catalogue of Federal Domestic Assistance
Catalogue of Federal Assistance Programs
Federal Register
Commerce Business Daily.

Using the final WEEA Regulations for 1980, Chesca then showed how to read federal regulations prior to submitting a proposal, emphasizing the sections on evaluation criteria, eligible applicants, definitions, and budget. (Rather than detail the information presented, you are referred to Vol. I: The Guide, p. 13; 16-17 for details pertaining to these documents.) Chesca concluded her remarks by stressing the importance of building network contacts in one's particular field as an essential source of information prior to submitting proposals.

Betty Ward joined the group at this point to present FWL's funding policy. She spoke informally, and focused on the following: 1) how FWL finds out about funds; 2) which agencies in Washington are education-oriented, and 3) which private foundations fund education-oriented programs. (A summary of her comments is attached.) Dr. Ward remarked that two essential factors for persons wishing to secure funding are to develop a national reputation in an expertise area, and to prove project management capability. To these ends she advised the interns to build their expertise area with an eye toward the "high interest, varied capability" approach, and to ask for opportunities to manage in their projects so as to test and develop their credibility in the vital area of program management.

A surprise visit was paid the group by Mike Webb, former intern, now studying for his doctorate at Columbia University. He is working there for ERIC, compiling a handbook on technical assistance agencies in New York City, and apparently quite happy in his new efforts.

How FWL Finds Out About Funds

The least productive, most organized way is to monitor the Commerce Business Daily and Federal Register daily to find what RFP's are of interest to FWL. A system has been devised wherein an RFP is identified and circulated accordingly. If no PI shows interest, it is dropped. If interest is shown, a list of those interested is kept. Betty Ward chooses one person to be primarily responsible for developing the proposal from this list, and marshalls others as necessary. There is a budget for proposal development: 1% of the first year's funding is allocated to put together the project and the proposal. This money does not include senior staff time: it is for writers, editors, typists, etc. The finished product is reviewed by an FWL panel, according to procedures established for this purpose (see the proposal procedures book in the Proposal Coordination department).

A more productive, more relevant method to FWL's work is to be on an agency list in Washington so as to receive notice of RFPs before they are generally publicized. This involves proving institutional ability in which statements of qualification as to capability are filed with pertinent agencies. Some of these agencies with whom FWL is on file with are: ESAA (for non-school districts), NSF (unsolicited proposals in the education area), and the Department of Energy.

The most productive way is to be involved in shaping programs for future bidding. This takes maximum efforts, and depends on the kind of networking contacts built up over a period of time.

Other ways FWL is funded:

- by being a sub-contractor: FWL is not an eligible bidder, but wants to perform the work; a consortium is formed, and part of the work subbed to FWL.

- by building one's way into a major potential area for funds, i.e., the aging. Done through intense networking.

State funding is a questionable area, as there are considerable problems with flowthrough federal money: it is restricted to a particular kind of job, and the state is very slow at remuneration for work performed.

Agencies in Washington - Education Oriented

1. Department of Education

2. National Science Foundation

3. National Institutes of Mental Health (FWL has minimal contact to date; they do intramural research, mainly; their external research is rigorously evaluated. Areas of funding: individual growth & development, counseling & guidance).

4. Department of Labor (youth employability)

5. Department of Agriculture (FWL has minimal contact here; they have extensive staff development funds)

6. World Bank & OAS (international education program development)

Private Foundations - Education Oriented

This sort of funding depends on person-to-person contact and the judgment of the foundation person responsible for granting the funds. An unsolicited proposal to a foundation is usually not worth the effort. Foundations usually charge from 8 to 12 percent overhead costs.

Some foundations and types of programs they fund are:

1. Spencer (granted Stanford funding for research on acquisition of sex roles; fund "esoteric" kinds of projects)

2. Exxon (grant to higher ed., including teacher ed. and fine arts. Regional offices: limited to local areas of NY and Houston)

3. Lilly (committed funding to religious colleges in Indiana for next several years)

4. Mott (community education)

5. Kellogg (regional; Lynn Jenks knows their funding priorities)

6. Kennedy & Rosenberg (handicapped)

7. Carnegie (community or higher ed. projects)

8. Ford (not funding recently)

9. Bay Area Foundations

   - S. F. Foundation
   - Bank of America ($50k-$100,000)
   - Standard Oil (" ")
   - Levi Strauss (under $25k)

SECOND EXAMPLE

This meeting exemplifies how the interns' viewpoints regarding what they must accomplish to complete the program are obtained. The first half of the meeting was on the subject of completion requirements and the second half illustrates the sharing of concerns among interns and the credit taking that is encouraged.

WOMEN & MINORITIES LEADERSHIP PROGRAM

INTERN MEETING June 9, 1981 Report by N. DeAnda

On June 9, 1981, a meeting was held at Berkeley School District Administration Building (Cliff Wong's office conference room.)

Present: Minerva, Chesca, Sandra, Elsie, Marty, Nat

AGENDA: . Review of Program Completion Requirements and Exiting Procedures
. Update on individual intern activities
. Politics of survival and strategies for making it in the system.

Completion Requirements and Exiting Procedures. Reviewed program completion requirements for feedback to the Coordinating Council. Questioned and discussed the qualification requirements for writing a proposal for FWL. Chesca related how she qualified herself.

She talked to Betty, the Deputy Director, when she was planning a trip to Washington, D.C. She showed Betty evidence of extensive experience in special education, and told her that she knew some funding sources and wanted to know other people to contact while there. Betty gave her an okay to represent FWL while there. This implicitly qualified Chesca for writing a proposal in special education should she herself locate the right funding source.

We analyzed her method of qualifying through a good presentation and use of appropriate information. In summary Chesca:

1. gave information regarding her experience in special education.
2. gave evidence that she knew the proper people to contact, and the proper funding sources.
3. demonstrated initiative.
4. showed knowledge of the political structure in Washington, D.C., i.e., proper contacts.
5. had identified funding sources and spoke knowledgeably about them.

Other factors that were in her favor were that:

1. There weren't any other competitors in the Laboratory to write proposals in the field of special education.
2. Betty knew that Chesca had experience in training professionals in the art of writing proposals and assumed that she would be capable of writing a fundable proposal herself.

Discussion ended with the conclusion that the final decision regarding an intern's qualification for graduation would be the advisor's and the project director. Some leeway for their showing expertise regarding proposal writing was provided in this way. They would not necessarily have to be designated proposal writers by the Laboratory.

The interns had no questions about supervision, but some on writing a budget. Chesca has not written a budget but is currently monitoring expenditures of a $400,000 project. Minerva, who is assistant director of a special education program in Berkeley has also not written a budget. Nat mentioned that special arrangements can be made for the people to have the experience of preparing a budget. This could be done by writing a portion of a proposal simply for the experience.

We briely discussed need for a professional folio. It need not be a chore, but simply a system for putting the information into a folder for later evaluation. Nat mentioned that he would like to review their accomplishments each month to make that easier and to provide a cumulative folio as well.

The interns had no questions about other requirements listed.

Update on Individual Intern Activities.

The meeting focus shifted to report what had been happening to each intern.

Sandra discussed the loss of funds for her project. The project director's reaction and the current status of various people (18) seeking other jobs. She doesn't expect that they will be absorbed by FWL, but that's what they were exploring.

Chesca is doing well, but occasionally feels that her success is unreal. She currently finished the report for the year and took credit for producing much information. She joked about the report being evaluated by putting it on a scale to see how much it weighs, rather than for its content.

Minerva took credit for having written a proposal that was funded for $50,000 and for having conducted an in-service day for a large group of teachers to complete needs assessment for evaluation. She was complimented by teachers who said that she was extremely efficient and effective. She's now compiling the information.

Minerva asked for advice on entering the Field Institute, Ph.D. program. Chesca advised against it and said that Minerva should stick with a recognized university such as U.C. where Minerva has already completed three years' work. Chesca feels that if Minerva really wants to do anything large in the field of special education, she needs to have worked with recognized people in the field and have the backing of a degree from a well-known university. Sandra was of a similar opinion.

Politics of Survivan and Strategies for Making It in the System.

The meeting concluded with the agreement to meet for breakfast on the 19th to talk about politics of survival and strategies for making it in the system. It was agreed that that is a subject that needs a full period of time all by itself. Much was accomplished in only one hour of this meeting.

THIRD MEETING

Meetings are held at the places of employment of different interns. This enabled all of them to see first hand where others are employed and the kinds of circumstances that they work in while in the process of developing their leadership skills.

This, again, is an example of an agenda devoted to interns concerns and achievements.

WOMEN & MINORITIES LEADERSHIP PROGRAM

INTERN MEETING September 9, 1981

Present: Elsie, Minerva, Alma, Marty, Nat, Steve, Amalia

The meeting was held at the Oakland Board of Education in Steve O's office.

Steve presented results of the Oakland achievement testing for 1980 - 1981 and then reviewed some of the principal ideas in his book on bias in testing (estimated publication date, Spring 1982, SAGE Publications). The achievement in the Oakland Schools showed an increase in achievement. This is not a significant difference, but shows a trend. The grades measured were 3rd, 6th, and 11th. The largest increase was in the elementary grades and that may explain the greater increase. Another factor was that older kids are less motivated to achieve and have already turned-off the sixth and the eighth grades.

He explained one of six methods of determining bias in testing, e.g., he identifies a sample of black children's and white children's scores. The samples are matched as much as they can be in IQ and achievement. Then the item scores are matched for the two groups in order to identify those items that only black children err on. This indicates that the item itself is biased in favor of the white children. An example, "They gets tired when they play too long." Because this mode of phrasing is common to black children, they assume that it is correct when to the white sample, it is not.

Alma described what she gained from attending the conference on management which was primarily intended for business people. She shared that she gained a lot from realizing that management in business is not different from management in schools. They have similar problems of trying to motivate people, getting them there on time, defining tasks and getting people to meet deadlines. She also observed that business corporations have a great need for educating their employees and that none of them think of obtaining the help of educators to design their programs. It's as if they have to reinvent the wheel.

She discussed some of the status in Oakland, such as trying to find a superintendent now that Ruth Love is in Chicago. She noted that her own status is that she is one of two or three black women in the state who are specialists in evaluation and who have relatively high positions. She took credit for how much she knows about management, the size of her job, her position in education and her chances of being promoted within Oakland School District. She clarified that she does not do the evaluation portion of her work. She collects all the data from all the schools and the government-funded projects.

Elsie also had an opportunity to talk about her own achievements. Nat asked her to talk about her recent proposal-writing for a $600,000 project. She smiled, gulped and proceeded to talk about how much she had learned from being responsible for producing the proposal and how frightened she was at undertaking it initially. She used the consultant support of Betty to help in writing the proposal. She took credit for having the national contacts and having established them even prior to coming to Far West Laboratory. Now she hopes that these contacts may pay off. She will know by the end of the month whether or not it was funded.

She and Amalia commiserated about miscommunications and having to rectify errors in political contacts, e.g., she had agreed to be on Amalia's proposal without clearing it with her boss. He blew up and Amalia and Elsie had to re-establish a good relationship with him.

Elsie also took credit for having coordinated the data collection for the national bilingual project and for now working on completing final reports of their studies.

Amalia talked about how much she had gained from being in charge of writing that proposal. It helped her to put together the previous skills exposed to such as identifying goals and objectives, and knowing a scope of work was in a proposal. The major learning come from having to deal with authorities. She was given responsibility without the authority of command over the staff who was writing the proposal. Her boss excluded her from major decision-making meetings, assigned her a member to her writing team in whom he had no confidence, rejected that person's work and forced Amalia to rewrite his portion to meet the proposal deadline.

Her boss misread the RFP and forced involvement of the Laboratory Deputy Director to clarify whether Washington would pay more than the 8% overhead that had been specified in the RFP. This was an additional obstacle to getting the job done. This experience made her realize that she did not have credibility within the Laboratory to be given the full responsibility for producing a proposal at this time.

Although the proposal was not submitted, she gained an enormous amount from the experience.

The meeting was a good one in that the interns took credit, recognized their achievement of high status in the field of R&D and came to terms with the reality that in order to survive they must know political strategies for handling authority and dealing with those who wield power.

SUMMARY

The intern meetings are an important source of support, a place to exchange ideas, to take credit for their accomplishments, to solve problems pertaining to their program, and to reinforce their identity as potential and developing leaders.

This section has provided minutes of meetings which exemplify these processes.

The meetings also serve as a means of encouraging and reinforcing the involvement of members from top administration and of other resource people who may be valuable to the program. By presenting or conducting seminars in these meetings, they get to know the interns personally and have the opportunity to give their best to their program.

In addition, both interns and mentors, and administrative staff participants see each other as a total system each playing their individual parts. This helps to increase the feeling of teamwork and of truly being involved in a meaningful program.

One important outcome of these meetings are the friendships that develop between interns. The following section illustrates the importance of interns supporting and learning from each other.

INTERNS SUPPORT AND LEARN FROM EACH OTHER

INTRODUCTION

Becoming a leader does not mean having to do it alone. Interdependence is emphasized in this program. In order to be interdependent, a person must be able to see the strengths that another person has to offer and to be able to use those as resources. It is an essential skill in being able to lead others.

Although potential leaders in this type of program are by nature highly competitive, they learn to benefit from advice, recommendations, and support of fellow interns to get the positions to which they aspire.

They avoid the distrust of and seeing others as either above or below them by developing respect for the personal and professional strengths that they recognize in themselves and others.

This section provides two examples of interns who find a source of information, professional support, and friendship in other interns as an outgrowth of their being in this program.

MINERVA

Minerva, a school psychologist, had the opportunity of apply for an assistant directorship of special education in an adjoining school district. She scheduled several individual consultations with the Project Director who knew the school district she was preparing her application statement and her strategy. Chesca, another intern in the program, had field expertise in special education to the severally handicapped, and Elsie had been employed several years in the school district to which she was applying. Elsie knew the politics, the individuals in administration and whether or not the job was a significant or trivial one.

Minerva scheduled business luncheons with each of these interns. From Chesca, who was the director of special education in a school district herself, she added to her own knowledge of special education. Chesca was also knowledgeable about whose-who in the special education field, both regionally and nationally.

From Elsie, she got advice about how to proceed in her contacts with the school district and how to prepare herself for the interview. She reviewed the issues that might be brought up in an interview and discussed with Elsie what would be ways of responding to those that would increase her chances of being hired in this school district given the nature of the administrative organization of the school district.

Using these resources plus her own hard work of preparing and being confident of the ten years of experience that she had had related to special education, enabled her to get the job.

That example showed the use that interns can make of each other for short-term advice. From this common experience of developing leadership capabilities, also grow friendships. The following example is one in which these two women not only developed a professional support relationship but a personal and friendship one as well. This is best expressed in Barbara's own words.

BARBARA AND CHESCA

My personal and professional friendship with Chesca has been perhaps one of the most valuable outcomes of my participation in the internship project.

Hearing that Chesca was applying for admission into the intern program, I went to talk with her about her motivations and what she hoped to gain in participation. I spoke also to those who had applied and had been turned down, alumnae of the program and the program director. After I decided that I could benefit from being an intern I suggested to Chesca that we help one another with the application procedures. She agreed and was relieved to be cooperating as opposed to competing. After the interview process we went to lunch and agreed that she had handled the interview much better than I had as she was clear about what she wanted whereas I was not. We also discovered that we had met several years ago at a feminist function and had several acquaintances in common.

When she came back from Guam I went to talk with her for some background information as I, too, was planning a trip to the South Pacific.

The informational talk turned into a discussion about how we both prefer to cooperate with peers than compete although we see some competition as necessary and even healthy at times. Her recounting of experiences in the South Pacific was later contrasted by my experience almost six months later. We began to realize in further discussions that our goals were very similar -- that of doing interesting work, increasing our responsibility and skill while working around assertive people with imagination. Our impressions of people and interpretations of situations, however, were almost opposite to one another. Thus our discussing events and situations, particularly those in the Lab became informative to us. The differences instead of separating us added to the richness of our interaction. I remember that once when I returned from a six-week-long business trip, I was curious about some of the ways I had been received. I couldn't wait to "run it through" Chesca to get another interpretation of what actually happened. Her impression was so illuminating that I ended up revising my quarterly report to reflect her interpretations.

The program director commented that we seemed competitive with one another. We've discussed this at length and realized that while we both wanted to succeed, we wanted one another to succeed also; one's success was not over the other, it just "was". We openly kidded one another during meetings and asked pointed questions -- this was from our ease with one another, not from any intention to hurt or embarrass.

It was helpful that the project director noticed that we both moved to positions of responsibility relatively quickly and were doing an appreciable amount of extra work. He provided us with an exercise called an "integration session" in which we portrayed our evolvement at the Lab. In one year, we went from unknown project associates to being sought after for major presentations. While we both welcomed the experience and opportunity, we also were fatigued by the quick adjustment. The integration session provided us with an opportunity to explore our changing images and we learned that we could feel comfortable being vulnerable to one another.

There were several specific instances during which Chesca and I were particularly helpful and supportive to one another. When I was writing my first

solo proposal, she reviewed it and made suggestions. When I was not awarded the contract she was a strong support -- empathetic and honest. She helped me realize that not winning is part of competing. When I decided to apply for PI status she encouraged me, made structural suggestions on my application and helped me celebrate when I was approved. In turn, when she wasn't awarded PI status, I helped her process what that means to her self image.

Later, when she was in the process of applying for a job at San Francisco State University, I provided her with an almost daily sounding board for her application strategies. We discussed interview approaches, how to deal with recommendations and then we celebrated when she was offered the job. I was glad she got what she wanted but was sad that my main support was leaving.

Her success inspired me to develop an unsolicited proposal to a foundation that I knew was a long shot but was something that I wanted to do. I was moved to take a risk by her success.

The strength of our relationship lay in the realization that we both had insights and skills and we were both better off if we shared them freely.

SUMMARY COMMENTS

The examples speak for themselves. All three of these women successfully acquired positions of leadership even before their internship was completed. This came about from their not only using each other as resources for learning and support but using all the other resources that were provided in the program.

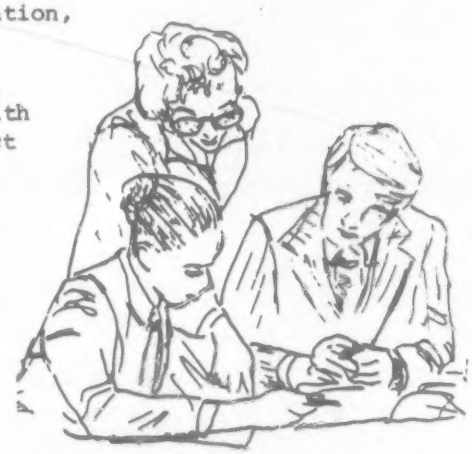
MAKING THINGS GO TOGETHER

INTRODUCTION TO THE CASE STUDIES

Every intern has their personalized way of going about learning what they need to know. You have seen that there are a variety of components to the program and that interns plan an individualized course of study with their advisors. What you may need at this point is to see how these various parts go together. Perhaps the best way to see this is to read two case studies which detail the strategies and routes two people have taken. In the course of reading these, you will see the interplay of advisor, intern, Project Director, coursework, seminars, network contacts, and achievements.

As an introduction to the case studies, it might be helpful to give you an idea of the eight types of resources that are provided in this program and to show the varying extents to which interns use them. The resources are:

1. Advisor (mentor). This refers to the chosen advisor or the Project Director whom the intern contacted no less than once per month and often on a weekly basis.
2. Human Resources. This refers to contacts with other professionals for consultation, advice, or short-term learning.
3. Networks for Visibility in the Field. This refers to the use of contacts with people with influence in their subject field.
4. Seminars and Workshops. This refers to one to five day semianrs or workshops given by professional organizations, universities, or FWL.
5. Political Contacts. This refers to people who are in a position to advocate for the intern, to recommend promotions or to otherwise introduce them to new opportunities.



6. New Opportunities. This refers to the use of new experiences, either within their job or in the creation of a temporary new job in order to apply their learning and/or on-the-job experiences.

7. Self-Assessment. This refers to periodic review of progress and reevaluation of the strengths and the weaknesses of the intern.

8. Other Interns. This refers to the use of peers for advice, recommendations, moral support, and/or friendship.

With this introduction to the chart, review the chart to note which of these resources were used by a sample of the interns (nine).

INDIVIDUAL INTERNS' USE OF THE WOMEN AND MINORITIES LEADERSHIP PROGRAM

INTERN	ADVISOR	OTHER HUMAN RESOURCES	NETWORKS FOR VISIBILITY	SEMINARS AND WORKSHOPS	POLITICAL CONTACTS	NEW OPPORTUNITIES	SELF-ASSESSMENT	OTHER INTERNS
BM	5	5	5	5	5	5	4	5
CP	1	5	5	0	5	5	4	0
AV	4	1	3	5	0	3	0	0
MM	4	2	2	3	1	5	3	1
DE	5	4	5	5	2	5	4	1
MWF	5	5	4	4	4	5	5	5
EG	3	2	5	2	5	5	1	0
SC	5	1	1	5	0	4	2	0
CT	5	3	5	2	5	5	5	3

SUMMARY

Note that all nine relied heavily on advisor contacts and new opportunities. Two of the nine, BM and MMF, used all of the resources that were provided. The other source that was used more than others was network contacts for visibility.

The interesting fact is that the success of the interns did not correlate with the number of the resources that they used. However, there was a rough indication that those who used the networks and political advantage in addition to advisor and opportunities have been more successful in terms of now being managers of major projects, earning more money, supervising more people and being more known in their fields.

Some people tend to be loners and do not use human resources or other interns. Some do not place much value on seminars and workshops, except as methods of contact while others placed importance on learning through coursework or professional seminars.

Minerva, Carol and Elsie all made extensive use of their mentors, took advantage of new opportunities to show their competence, and made themselves more visible in their respective professional fields. All three achieved executive level positions.

Chesca, one of the most successful, together with Minerva and Carol, was an anomaly in that she did not make extensive use of her mentor, but emphasized developing her visibility and political contacts, and used new opportunities as stepping stones. She achieved directorship of a large project which served the school district of a major city in a department of the major university.

The two case studies which are presented here are of one individual, Michael W., who would not use political contacts or extensive use of other human resources, but achieved his success through concentrated and hard work. By contrast, Barbara M., who succeeded in becoming a principal investigator within eight months, used all of the resources available and made extensive use of contacts in her field and with funding sources in Washington and in regional offices.

CASE STUDY OF BARBARA M.

THE BEGINNING

B's involvement in this project began in December, 1979, when openings for the internships were made known. She talked to a number of people who had been in the program and to people who were in a position to judge its effectiveness in promoting people within the laboratory. This characterized her resourcefulness and thoroughness in making sure that her investment would produce results.

Her application required that she answer a question regarding what her potential for assuming leadership was and what her professional goals were. Her writing style was clear and showed ability to answer the questions explicitly and with specific examples of her experience.

Her performance in the selection interview with the Coordinating Council was very different. Her answers to questions were overly elaborated. She gave much information and showed a tendency to wander and to and to engage people on the Council with questions that reversed her role of interviewee. When asked about her specific future goals, she was unable to be specific or to indicate some clear plan for achieving them. One of the Council members with the most influence in the laboratory, BW, the Deputy Director, became increasingly annoyed with how much she talked beyond the issue in the questions. Barbara was aware of this after the interview.

> She (BW) was hardest on me for not having a clear focus for my involvement in the program and for not having a well-defined content area. I explained that while I had been in education and administration for eight years, this was my first year in R&D and I wanted to begin to focus by being in this program.
>
> Barbara M.

The fact that Barbara was currently an acting director of a project within FWL, showed experience in innovating projects in her work history, evidenced she had progressively climbed to more responsible jobs from previous ones, indicated that she had leadership potential.

The first step to enable her to use the resources within FWL was to help her formulate clear objectives and to select a mentor who could truly help her in her effort to advance herself.

The Project Director assisted her in an individual meeting in clarifying her goals and objectives and outlining her work to be completed in the first quarter. This was preparatory to her meeting with a potential metnor who had expressed an interest in her. Preparation was to enable Barbara to present herself clearly and effectively. Consequently, her meeting with Betty Ward, Laboratory Deputy Director, was a complete success in that she did present herself clearly and commandingly and obtained the support of Betty as her mentor. The match was a good one. Barbara, being a feminist, needed someone like Betty who is a model of competency in management and in the field of educational research.

In the courase of their meeting, she identified the need to develop research skills and an expertise area for which she could be known in the field.

> During the first meeting with my advisor I was nervous because I felt her to be critical of me and because I realized that I lacked the clear focus that she required. By the second meeting, I was relaxed and from then on was open and talkative. The Project Director helped me to prepare for the first two meetings, both content-wise and in understanding how to best utilize the time of a busy person. This was a good lesson and I clearly benefited from the interaction with my advisor. With her assistance I decided on several areas of expertise that I kept developing through my involvement with the program.
>
> Barbara M.

SHE PRESENTS HERSELF IN THE FIRST INTERN MEETING

The first intern meeting gave each person the opportunity to review their background and previous experience. Although Barbara's review of her history was too lengthy, she did impress everyone with evidence of her initiative in previous jobs and the scope of her experience. This time, she was able to summarize her professional objectives clearly and succinctly. Her preparation through meeting with her mentor and the

Project Director had helped her to think and to articulate in a more organized manner than previously. The meeting was valuable to her and to the group in that they discussed the conflict they experienced between devoting themselves to learning new skills and doing an outstanding job in their present work. They agreed that they couldn't do both. They agreed that they had to set their priorities and to seek what was in their best interests.

Barbara demonstrated the ability to use the intern meeting to practice articulating clearly, to solve the problem of priorities and to take credit for her ability to develop contacts in Washington, D.C.. In the process, she gave others methods by which they could develop contacts and strategies for becoming known in Washington, D.C. The following are some of her comments:

> Another person who was helpful to me was Fred Roseneau, the Laboratory's Washington liaison. Perhaps because he and my former supervisor worked closely, he and I were in regular contact. At first it was for him to do some writing for my project, but gardually I just got in the habit of calling him with some information and asking, "What's new?" The resulting conversations were so broadening that I thought I'd try the same approach with y project officer. After doing a little business, I'd ask about his family and then, "What's happening in the Department (of Education)?" These conversataions along with reading several national educational publications helped me to gain some knowledge and insight quickly.
>
> Barbara M.

HER WILLINGNESS TO INITIATE SHOWS

Her ambition and willingness to assert herself showed in her desire to be the elected representative of the interns on the Coordinating Council Board and to become a Principal Investigator within FWL within the next six months. As part of her strategy, she proposed to use program funds to attend the national annual meeting of the American Education and Research Association. The purpose was to become familiar with nationally-known education researchers and to test the possibility of soliciting funds for her proposal.

She obtained the advice and support of her mentor, Betty Ward, for developing a network of influential contacts. She was encouraged to learn what was being done in education at a national level.

> In reviewing the AERA Catalog, I found several seminars that were directly applicable to my work including two intensive conferences on evaluation. I needed to apply the information immediately and wanted crash courses with the best evaluators in the country. Although in my project work, I would hire content specialists to actually conduct the national workshops, I wanted to understand the content area myself so as to hire the most appropriate people and design an effective workshop. For the workshops I took off about eight days of project work to learn about evaluation. My project's workshops ended up to be excellent and the evaluation tool that we developed was used nationwide.
>
> Barbara M.

THE USE OF INDIVIDUAL MEETINGS

Individual meetings with the Project Director of the Mentor were used for a variety of purposes. The description above shows the use of a meeting to enable her to rewrite her resume and prepare an application. In addition to this, she used meetings to assimilate what she gained from conferences which she attended. An example was planning to provide training to community colleges and other institutions within her own project regarding effective program evaluation. This followed her attendance at a conference given by Michael Scriven, a nationally-known program evaluator.

Her immediate objectives were to develop a fundable proposal and to become a Principal Investigator. She did not get financial support for writing a proposal until she did become a Principal Investigator within FWL. The Project Director assisted her in completing the application to be designated as a Principal Investigator. Requirements for PI were reviewed and she received assistance in rewriting her resume to support her application for the new designation.

USE OF INTERN MEETINGS

By the end of February, Barbara was well into the program. She was always generous in contributing to the meeting discussion and at this meeting, she told others about one of the ways of making themselves known to professional groups and to the administration within this institution. She said there were funds available for making professional presentations in the field when it is advantageous to this institution. She also indicated how they could go about doing that. It was clear that she was assuming a role of both educating others as well as using them as support.

She continued traveling to various parts of the U.S., providing technical assistance and presentations to community colleges. On one trip, she addressed a gerontology conference in Florida as both a means of assisting them and also making herself known in a new area of continuing education.

> In terms of credibility in my field, I got assistance with focusing on Adult and Continuing Education as a content area. Thus I began to participate in those meetings and conventions in that area and read professional journals more regularly. Because with the CETAC project, I was dealing with a number of professional associations, I got to know the Director. I was asked to present at AEA (Adult Education Association) and AAJC (American Association of Community and Junior Colleges) national meetings and the CATESOL (California Association of Teachers of English as a Second Language).
>
> On the suggestion of my project officers, I was asked to do a workshop at the Florida State Gerontological Society's annual meeting and to present at a meeting of the National Advisory Council on Continuing Education. I saw a need for a California branch of the National Adult Education Association and became part of the group working for affiliation, and later a member of the executive committee and most recently a voting delegate to the national convention. I have been asked twice to go to the South Pacific to consult in adult education and establish a continuing education department of the American Samoan Community College,

and most recently to consult to the American Indian Center and the National Office of Samoan Affairs.

Barbara M.

COORDINATION BETWEEN INTERN AND PROJECT DIRECTOR

In order for the advice and information to be consistent, the Project Director kept in communication with Barbara's mentor, Betty. Both agreed that Barbara had excellent potential as a leader, i.e., good management skills, effective political sense, assertiveness, intelligence and willingness to work hard. It was also agreed that she needed to focus her efforts and attention to one expertise area instead of spreading herself so thin over too many areas.

As a result, she received further assistance from both people to encourage her development of one domain of expertise.

THE NEED FOR INTEGRATION

Both Barbara and another intern, Chesca, had been using all opportunities offered by the program, i.e., money to attend conferences, contacts within the Laboratory, strategies for obtaining funds through the Laboratory administration. Both became known within the Laboratory and to others in the field.

Barbara had already applied for Principal Investigator designation within a period of two months in the program, and Chesca had written and submitted a proposal for funding within the Laboratory which was likely to be funded. Both needed stabilizing after flying so high.

In an "integration session," the Project Director provided them both with the opportunity to write about and to diagram the changes they had affected through important achievements and events the previous year. They initially saw themselves as being insignificant within FWL. They were both antagonistic about the size and the seemingly impersonal nature of FWL. They saw administrators as indifferent towards people within the institution. By the end of the integration they saw themselves as having a potential to work in educational research beyond FWL. They saw themselves as able to obtain funds and having an effect outside of the Laboratory.

The reexamination of their accomplishments and their role within FWL enabled them to see avenues for them to achieve what they wanted within education.

> It was helpful that the Project Director noted that Chesca and I had both moved to positions of responsibilty relatively quickly and were doing an appreciable amount of extra work. He provided us with an exercise called an "integration session" in which we portrayed our evolvement at the Lab. In one year we went from unknown project associates to being sought after for major presentations. While we both welcomed the experience and opportunity we also were fatigued by the quick adjustment. The integration session provided us with an opportunity to explore our changing images, and we learned that we could feel comfortable being vulnerable to one another.
>
> Barbara M.

QUARTERLY PLANS AND RESISTANCE

The Quarterly Planning enables the intern to be clear about what they are trying to accomplish within a three-month period, but more importantly, the planning forces them to coordinate their objectives and strategies with their advisors.

> My participation to the internship project provided me with the funds to participate in meetings. Knowing that I was expected to report on my quarterly progress as an intern helped me guage my efforts. Previously I didn't think about professional growth, I just followed my interests and learned what I thought I needed at the time. I didn't consider a deliberate plan for advancement.
>
> Whereas I have usually been able to recognize my strengths, the project helped me identify areas that I needed skills in and provided the means for developing those skills. One example was in being more focused when dealing with administrators. Another was knowledge of proposal writing.
>
> I realized that to progress in R&D I needed to learn about evaluation and to write proposals -- so I did that. I also realized that I

> seldom did long-range planning for myself but just for projects, and I have just begun to do that. I realize that I need more experience with computers and in political strategizing and in interview techniques. I have begun to research Ph.D. programs that I could be involved with part-time as I work in my field.
>
> My management and conceptualization skills are strong as are my networking abilities. Probably the single most important and difficult task was in developing quarterly plans and actually following them. I have become a bit less impulsive and a bit more deliberate in my actions.
>
> Barbara M.

Barbara benefited much from this in that it forced her to outline a scope of work with specific objectives in mind. The list of her goals were six, but of those, the two that she and Betty Ward emphasized for her development were developing her proposal writing skills and continuing to develop her visibility in the educational field.

She had no problem in preparing the application for PI, but did show much resistance to developing her proposal writing skills. She missed meetings that were scheduled for clarifying the proposal she had in mind and later revealed that she was apprehensive about writing a full-blown proposal. As a result, a step-by-step proposal writing plan was developed after she completed making herself known in the field.

INCREASING HER VISIBILITY IN THE FIELD

Through funds from this project, her trip to Washington, D.C. for her own work was increased by paying for more days for her to make contacts in Washington. She planned carefully for that trip by using several resources in planning the trip. She talked with her advisor, to another professional with extensive experience in dealing with Washington, and in planning out the strategies for contacting these people with the Project Director. She got names of people to contact from Betty and from the second person mentioned above, and outlined her strategy with the Director.

> Besides aiding my involvement in the intern project my advisor recommended that I apply to be a PI and that I apply for continuity of employment. Because I was seen in the

role of responding to RFPs I began to see myself as being responsible for bringing funds into the Lab. Thus on one of my trips to Washington, I stayed several days extra to develop some federal funding contacts. I met with representatives of DOL, NIMH, AOA, FIPSE, and HUD. My advisor recommended in-house people for me to talk with to get contacts and the project director helped me to prepare for these interviews. Wereas I've never been shy about making contacts, I think that unless my advisor had gotten me into the habit of seeing the big picture of funding, I may not have thought to developing new projects so soon or making contacts for the Laboratory as a whole, not just for myself.

Barbara M.

Examples of the strategies which she learned for establishing contacts with funding source people show in the following guideline that she made:

- Know the title and role of the contact person;
- Talk to other people about that person's idiosyncracies, preferences or biases;
- Get as much information about the department in which the contact person works from FWL's person in Washington, D.C.;
- Know the funding trends ahead of time;
- Review the annual reports made by the department within which the contact people work;
- Prepare one page outlines of proposal ideas which can be left with those people.

By May, she not only had her plans for the contacts, but had additional money because she had been designated a Principal Investigator. Her trip to Washington, D.C. was a complete success. She not only served her own needs but brought back information learning about funding that the Laboratory could seek to obtain and to make herself more known to FWL's administration.

PROPOSAL WRITING SKILL DEVELOPMENT

The regular quarterly review meeting including the Project Director, Barbara and her advisor was timely in that it served to give her much credit for how much she had accomplished within only six months and to

encourage her to get on with developing the proposal-writing skills in order to obtain her own project.

She already had a start of encouragement about proposal writing, both from Betty Ward, her advisor, and from the representative in Washington who mildly reprimanded her for not sending her ideas for proposals in the form of one page prospecti. It became apparent to her that she did not have the potential for obtaining funds in a different kind of program and that she would have to write the proposal. The pressure was on to learn the proposal-writing skills.

Barbara had been writing professionally for some time. She produced a monthly newsletter which was distributed nationally so that there was no question that she was able to write. The problem was overcoming the fear of developing a proposal that would stand on its own.

To develop her proposal-writing skills, she received assistance from her advisor and decided to go about this by attending a workshop presented by the project director, reviewing mini-proposals that were funded within this institution and by participating in a five-day workshop for proposal writing provided by the grantsmanship center.

The beginning proposal-writing development had begun two months early when in her meetings with the Director she had discussed ideas for fundable projects in serving the community, and ideas in providing services to people prior to retirement and for retired people. This was furthered in an impromptu meeting when the Director dropped into her office. Within a short time she organized what she had been thinking about for some time, she outlined the purpose of the proposal, i.e., to assist pre-retirement and retirement people to cope with and effect change in community and environment. She then saw the relationship of defining a purpose, providing evidence for the need, and a review of what is currently being provided and a proposed approach to the problem. She was to further detail this proposal, not necessarily funding but for the practice of fleshing out the idea and further conceptualizing the format of proposal writing.

When we did meet again in two months, she was ready to practice proposal writing. She attended an in-house workshop provided by the Director on the formating of a proposal, i.e., differentiating purpose and goals from clear statement of measurable objectives and developing the problems statement, the needs statement and the outline of scope of work. All of the interns

were able to use the materials and direction to write goals and objectives with the exception of Barbara who froze when having to identify different parts of the proposals.

The director gave her many examples of mini-proposals to review in preparation for her participation in the proposal-writing workshop in late July. She participated in that workshop that gave her experience in writing a rough draft of a proposal and benefitting from a critique by others.

In response to having to write a "Request for Proposal" from Washington for the sum of a quarter of a million dollars in the Department called ACTION (the same Department that funds VISTA and Teacher Corps), she supervised a team of four in the preparation and writing of this proposal. It was this experience of having to supervise the writing of others, having to do the writing herself, having to employ an editor, and to coordinate her production of this proposal with the supervising administration, in this case her advisor, in order to meet the short deadline. Within one week of working long hours and with skilled cooperation, she produced a 200-page proposal that met all professional standards for being funded.

She was thoroughly proud of herself for having been able to marshall all the skills that she had developed, plus the information that she had obtained in her participation in workshops in the previous three months. Her fear of writing a proposal and stalling for time disappeared. Her attendance at the grantsmanship workshop helped her by giving her the confidence to attempt this real one.

> A major seminar that I attended was Grantsmanship and although geared for more human service sector professionals -- I have written three proposals since that workshop (one two weeks after the workshop) and have worked on three others.
>
> Barbara M

She now felt ready to consider publishing articles and completing her Master's thesis. New confidence and interest in writing was a major achievement for her in this program. She could now see herself as a proposal writer. This rounded out her repertoire of competencies to be a project director in educational research and development.

Her new confidence and sense of achievement showed at

the next intern meeting when she advised others as to how they could go about learning proposal-writing skills.

> The most important thing was that I could break through the block I had about being able to write a proposal. Now I am confident about my ability to respond to RFPs and submit unsolicited proposals, and I even enjoy participating in proposal development meetings.
>
> Barbara

DISAPPOINTMENT AND TAKING CREDIT

By mid-September, Barbara had been told that her proposal had been rejected on a technicality. She had not researched the RFP requirements carefully enough. She felt humiliated, angry at not even getting into the competition when the proposal seemed to be a good one, and embarrassed to have failed her first attempt on an oversight. It was hard enough for her just to enter the competition but when she was thrown out of the race on a technicality after having worked so hard, her feeling humiliation and disappointment was overwhelming.

The director helped her by providing a new way of looking at the situation. He had her examine what she had learned and what she had demonstrated to herself and to the administration. After acknowledging that she produced a major proposal within record time, one week, that she learned to coordinate and to teamwork with others to meet the deadline, and had overcome her fears of writing through this experience, she gave a sign of relief and began to see that all was not lost and that she was not a failure.

The reality that she had established herself became apparent in her being given continuity at the end of her project for the express purpose of seeking new funds. Evidence of her new standing in the administrative ranks in this institution was clearly stated in an interoffice memorandum to all principal investigators and written by the deputy director of this institution. The memorandum reads:

> Barbara has submitted two proposals and is submitting a third, one to FIPSE, another one to DOL/FIPSE on providing TA to CETA projects and the third to Kellogg, a private institution for providing training to boards of directors on

non-profit human service agencies together with UMBA.

B is available to work in any of the projects to perform the following tasks:

Planning and facilitating
Managing projects and budgets
Designing and conducting technical assistance
Writing proposals and reports
Designing and conducting teacher training

Deputy Director,
FWL

Within one year, Barbara had evolved from relative obscurity in the administrative ranks and being seen as somewhat fuzzy and scattered in thinking to becoming a principal investigator in R&D, a competent proposal writer and director of projects in R&D. Although her achievements are majorly a result of her drive, resourcefulness, and willingness to work hard, the assistance of her advisor and mentor, BW, and the supportive and educative guidance provided by the Project Director and her professional peer relationship with another intern were the additional factors which enabled her to complete this metamorphosis in professional R&D.

The intern project helped me focus on an area and gain totally new skills in that area. The project also enabled me to see myself as a principal investigator and as such, more responsible for knowing who's doing what in the Laboratory on the whole and in R&D on a national scale.

Barbara

CASE STUDY OF MICHAEL W.

BACKGROUND

Mike began his internship with the Women and Minorities Leadership Program (W&MLP) in January 1979, after having been employed wiht Far West Laboratory (FWL) for eight months as a development and training specialist with the Adult Satisfaction and Productivity Department. As a training specialist he was responsible for providing technical assistance and training to school personnel interested in implementing the Experience-Based Career Education Model (EBCE). The job required a considerable amount of interaction with school administrators, community groups and federal and state officials.

He came to the internship program with quite a bit of professional experience in youth and adult education. He had served as a consultant to Peralta Regional Adult and Vocational Education Council (PRAVEC) services and had developed a curriculum for Adult Basic Education which incluced both audio and visual instructional units for public relations presentations.

In addition to his professional experience in youth and adult education, this intern came to the program with a developed talent talent for writing. He had a list of publications and papers to his credit on subjects ranging from desegregation of public education to ideology for Blacks in documentary films.

His application to the W&MLP stated that he viewed the program as a vehicle for furthering his career in educational R&D.

> During the past ten years, I have developed the ability to plan tasks and to coordinate their execution. I can effectively work with divergent groups of people and enjoy the challenge of working under a variety of conditions. However, time management and the budgeting of resources are areas where I feel the need for improvement. As an intern I would like to develop and implement a plan to improve these two areas.

PROGRAM RESOURCES

MENTOR

Mike selected his immediate supervisor, Ralph Baker, for his intern mentor. Ralph proved to be an effective advisor and advocate. He provided guidance, practical advice, strategies for learning and advancement and an introduction to available resources. He helped coordinate graduate coursework with on-the-job training so that newly-acquired skills could be practiced and mastered. He also acted as an advocate, promoting Mike both internally and outside of FWL. He made sure that Mike was invited to meetings and recommended him as a presenter at national conferences. He encouraged Mike to attend workshops for professional growth, sometimes recommending particular workshops and always helping to integrate the workshop material with on-the-job responsibilities. Ralph invited Mike to accompany him on a trip to Washington, D.C. and the trip was made possible by financial support from the W&MLP.

During the 16 months of the internship, Ralph served as a link between Mike's job and the activities sponsored by the W&MLP. Evidence of this occurred when Ralph encouraged Mike to submit an in-house mini-proposal which provided an opportunity to practice proposal-writing skills.

The communication between intern and mentor was continuous and ongoing. Ralph encouraged their regular contacts and provided a structure for their interactions. They saw each other daily and weekly evaluation meetings were scheduled. Ralph devoted time and effort to analyzing Mike's strengths and weaknesses in addition to assessing his progress during the course of the internship. Ralph and Mike created a perfect match. Both were committed to the W&MLP and both were active in creating opportunities for leadership and management experiences.

HUMAN RESOURCES

In addition to his mentor, the W&MLP facilitated Mike's use of other human resources. Mike took advantage of the opportunities presented to work with FWL professional and benefit from their particular areas of expertise to increase his own knowledge skills in evaluation, budget management and proposal writing.

The Project Director of the W&MLP worked extensively with Mike on developing a survey instrument for an FWL-funded study, "Competencies Essential to Managers in Educational R&D." Under the Project Director's supervision, Mike reviewed the literature, helped develop a competency inventory and observed the technical analysis of the data. This gave him an opportunity to learn instrument development, data collection, statistical analysis and interpretation of results. For more information and experience in the area of evaluation, Mike met with Rob Slaughter, an FWL evaluation specialist, and worked with Bob Spotts, the director of the Greenhouse Program at FWL on the program evaluation.

In order to increase his knowledge of the budget management process, Mike worked with personnel from FWL's Financial Management Accounting Department. His involvement ranged from reviewing project budgets to preparing sample project budgets. These activities were closely monitored, evaluated and discussed with his advisor.

Another way Mike used the expertise of FWL professionals was through submitting an in-house mini-proposal. Not only was this a way of putting his proposal-writing knowledge into practice, but he was able to get extensive feedback from an in-house reviewing committee. The Committee commented on how well his proposal was written and organized; and although they had many reservations concerning the approach, the value of probably results, and its relevance to FWL's mission, they believed there was merit in the idea and recommended that the proposal be revised and resubmitted. The W&MLP Project Director outlined two pages of recommendations that emphasized ways to strengthen his conceptualization of the study and the evaluation design.

RELEASE TIME

The W&MLP provided several days of release time which gave Mike the opportunity to attend workshops, travel to Washington, D.C., and write several proposals.

> The program provided me with several days of release time during which I was able to attend workshops, travel to Washington to investigate funding sources, read, write, and work on several proposals (submitted to the National Endowment for the Arts and the San Francisco Foundation), and to be excused from some of my regular duties, without a loss of salary.

This release time was used to develop my proposal development, evaluation, and management skills. In addition to the proposals referred to earlier, I used 1¼ days of release time to develop a mini-proposal which was submitted to Far West Laboratory, but was not funded.

WORKSHOPS

During the course of his internship Mike attended two proposal writing workshops which he put into practice by writing several proposals. He also attended a one-day workshop on effective time management which refreshed his knowledge of management by objectives and taught him procedures for restructuring and organizing his time and daily activities more efficiently. Attendance at a workshop on Regional Dialogues in Worklife Education exposed him to funding sources for creative approaches to worklife education. The information he received at this workshop exposed him to innovative programs and provided him with new ideas and activities as well as giving him the knowledge and skills he needed to seek funding opportunities. This workshop, along with his trip to Washington brought him closer to his goal of obtaining information on strategies for developing funding sources.

FINANCIAL SUPPORT

The program provided financial support for attending workshops and accompany Ralph Baker on a trip to Washington, D.C. The purpose of the four-day trip was twofold: to attend a conference on the establishment of a national youth service and to make personal contact with R&D leaders. The former proved to be the most valuable and Mike recommended that all interns could benefit from a similar trip.

For participants in the Women and Minorities Leadership Program, a trip to Washington, D.C. can be a valuable experience. In fact, it is my belief that such a trip should become a formal activity of the program. However, two pre-requisites are vital to the success of this activity: planning and advocacy.

PLANNING. This should include: 1) drawing up a list of reasons for making the trip; 2) identifying a set of potential sites to visit in

the city; 3) obtaining and studying a detailed map of the area, since many agencies are located in close proximity to one another and being aware of their location can facilitate planning and save time; 4) making advance contacts and scheduling appointments; and 5) building in a degree of schedule flexibility, since it is often the case that a person can learn about resources (people, agencies, research shops, etc.) while visiting a particular site. Free time should be built in to allow interns to investigate resources that they encounter while in Washington, D.C.

ADVOCACY. The old adage, "it's not what you know, but whom you know," certainly holds merit. Once an intern has identified a particular person or site to visit, it is helpful, indeed, downright important, to buzz around and find a Lab employee who has already established a relationship with that person or agency. This "contact" can provide valuable background information, suggest a particular person to see, or even place a call of introduction for the interns. Such an introduction can go a long way in inducing busy people to take time from their work schedules.

ACCOMPLISHMENTS

Mike completed his internship in April 1980. In the course of his sixteen months' internship he demonstrated achievements in the following areas:

Development of an Expertise Area.
Mike continued to expand his knowledge of youth and adult education. He participated as a consultant to the National Commission on Resources for Youth Conference held in Chicago, March 1980.

Writing Skills
As an intern, Mike focused on technical writing development. During his internship he served as a consultant for Community Art Resource, a third world organization and wrote four proposals for them. The proposals were submitted to and funded by the National Endowment for Humanities and Arts and the San Francisco Foundation. He helped write several FWL proposals with the guidance of his advisor. He also submitted a mini-proposal for in-house funding.

His technical writing development also included an article entitled "Expanding Employment Opportunities

for High Risk Youth." The article was published by ERIC and resulted in his becoming a consultant for the National Commission on Resources for Youth. Mike was also involved as a principal writer for a CETA program, the Montana Field Learning Program. This program received much attention and is referred to as a model of its kind. His writing competency further included development of several manuals and assessment instruments. He was also a regular contributor to two community newspapers.

Management

Obtaining management experience at FWL was not accomplished in the course of his internship. However, Mike had previous management experience as a supervisor of adult basic education teachers. He had also served in a supervisory capacity while employed with Opportunities Industrialization Centers. As an intern he augmented his management experience with further coursework at San Francisco State University.

Budget Management

Mike learned about budget management from working with personnel in FWL's Financial Management and Accounting Department and demonstrated his ability to conceptualize and prepare budgets in the proposals he wrote. He completed coursework in budget planning in his management course at San Francisco State University.

Program Design

Mike's experience in program design is evidenced in the proposals he conceptualized and implemented. The development of the Montana Field Learning Program, the educational guides produced as part of the article submitted to the National Commission on Resources for Youth, and the in-house mini-proposal were also used as a vehicle for utilizing the skills that he had learned during the course of his internship.

Knowledge of Funding Sources

One of the essential skills for managing educational research and development projects is knowing how to obtain funds. Mike's mentor, Ralph Baker, offered him a unique opportunity to learn firsthand about the funding sources of Washington and about the strategies that are needed to become known to these sources.

He accompanied him on a trip to Washington, D.C. The trip, sponsored by the W&MLP, enabled Mike to observe contract negotiations and increase his knowledge of funding sources. It provided him with the opportunity to visit and make personal contact with people in federal agencies who were involved in funding advocacy

programs for youth. As a result of this trip, Mike established contact with high-level officials from the Department of Labor and the National Institute of Education, gained insight about the relationship of politics to proposal writing, and obtained knowledge of the dynamics of federal program planning and people who wield influence.

PROGRAM EVALUATION AND RESEARCH DESIGN SKILLS

To develop skills in this area, Mike worked with Bob Spotts, a Principal Investigator at FWL, to develop evaluation for the Greenhouse Program and particpated in data collection and writing interpretations of the findings. Mike developed a number of evaluation instruments for other programs, including those for the Experience-Based Learning portfolio in the EBCE program.

The Project Director of the W&MLP provided on opportunity for him to participate in a research study from beginning to end. His participation included his developing a survey instrument.for the study of "Competencies Essential to Managers of Educational R&D Programs." He contributed to the formulation of the research design, instrument development, methods of data collection, choosing of the statistical analysis, and in the final writing of the interpretation of the results. His specific assignment was to provide a review of the literature and to assist in the development of the inventory for assessing competencies of managers.

A secondary benefit was that he consulted with other research professionals within FWL and learned about their specialization. For example, in working with Rob Slaughter, an evaluation specialist, he learned about the variety of evaluation contracts in which Rob was involved and of the kind of expertise that was required to work in this specialization.

COMPLETION OF THE INTERNSHIP PROGRAM

The objective of the internship program was to enable a person to have opportunities in management. Preferably, the new positions would be in the field of educational research. This intern had seen the need of furthering his potential by completing a doctorate at Columbia University before continuing in the field of educational research. He was encouraged through his contacts with other researchers to obtain his degree and to involve

himself in international projects related to educational research. He was particularly interested in studying in Africa and promoting educational opportunities for Black people.

In keeping with his having learned the strategies of placing himself in positions where there would be future opportunities, he obtained a consultantship with the ERIC. This would both enable him to provide some support while he studied at Columbia and would open avenues for his obtaining further jobs in this field.

Two years later, Mike did complete his doctorate and is now an assistant director of a branch of the ERIC Clearinghouse, a national research resource center.

SUMMARY CREDITS

Mike gives credit to his success in the internship program to the effective relationship to Ralph Baker, his mentor, who provided opportunities to him to learn and encouraged him to continue his education. He also noted that his relationship to the Project Director was essential in recognizing the strategies for obtaining positions which gave him further skills to become a manager and a leader in research. Inevitably, the major credit was to himself for being willing to use the opportunities in writing proposals, developing instruments, using the funds to learn about funding sources in Washington, and by participating in the group intern meetings to learn about the means by which others were developing their skills as well.

KEEPING IT GOING

PREFACE

The Project Director is the key to keeping all the persons involved informed, setting meetings, task deadlines, and in facilitating the participation of all the people in the program. These principal people are members of the Coordinating Council, the interns themselves, their advisors, and resource personnel.

In addition to the people contact, the Director needs to be knowledgeable about coursework and programs in universities and professional seminars and workshops which relate to the program. Development of the content and the nature of the experiences for developing knowledge and skill can be gleaned from the documentation of what each intern is doing and from the quarterly planning and review meetings. The information from these sources would indicate which experiences the interns are finding to be most effective for their professional development and the extent of the concentration of a particular subject area, e.g., project management or technical writing.

The last and also very important task for the Director to complete is publicizing the success of the program to the institutional administration. The program must be in good standing in the eyes of those in the institution in order to have credibility and support.

WORKING WITH THE COORDINATING COUNCIL

Monthly planning meetings need to be held with the Chairperson of the Coordinating Council. In these one-to-one meetings, the current issues in the program are discussed, the role of the Coordinating Council in relationship to what is going on at the time is identified and agendas are planned.

The Chairperson must be adequately informed in order to assume appropriate leadership in the Coordinating Council meetings. The purpose of those meetings is to get ideas, recommendations and support for making the program effective.

The project supports the Chairperson by providing administrative assistance in setting up the meeting, taking notes, and providing whatever clerical assistance is needed as a follow-up to the meeting.

The Chairperson reviews the minutes and endorses them before they are sent out to other members and has the authority to add or change the minutes according to her/his view.

It is advisable to maintain informal as well as formal contact with the Chairperson in order to facilitate the ease of exchanging information and mutual cooperation in the teamwork relationship.

WORKING WITH THE INTERNS

The interns are, of course, the most important individuals in the program in that they are the subject and the product of the training effort. The Project Director has several means of maintaining a close relationship with interns. One is through individual meetings, either initiated by the intern or by the Project Director to discuss plans, current seminars, or how the intern is using her/his budget for training.

The quarterly meetings which include intern, her/his advisor and the Project Director are times when all three take a serious view of what should be informal and on a peer level rather than of a teacher-student nature. There should be mutual respect for the experience and professionalism each brings to the meetings.

The Project Director sends out periodic memorandums with information about upcoming professional seminars and workshops, graduate courses in local universities and current events or articles which have to do with the training content. This serves somewhat as an informal newsletter. In the FWL program, the interns received notices from Washington, D.C. regarding funding opportunities, information relating to new legislation which affected educational research and new trends within the institution itself.

The intern is free to see the Project Director as often as needed. During crises, some interns might seek the assistance of advisor or Project Director twice a week. This is not common, the frequency of contact is at least once a month, but usually amounts to twice a month.

The contacts can be informal such as dropping in and chatting about something related to what they are doing on their job or discussing what someone else might be doing. Other meetings may be fairly formally focused, such as discussing how they are accomplishing their quarterly objectives and what successes and problems they are having.

An open door policy to seeing individuals in the program or receiving phone calls from them is a good rule of thumb because all of the individuals involved have heavy workloads and complicated schedules. It is best for at least the Project Director to be available and accessable as much of the time as possible.

KEEPING IN TOUCH WITH ADVISORS

A meeting with advisors should take place at least once a month besides the quarterly planning time. The Project Director should set aside time to discuss viewpoints about the intern and her/his progress.

Some informal contacts are useful to ease the working relationship between the Director and the advisor. Caution should be kept about avoiding competition in being a resource to the intern. This is reduced by frequent contact and the Project Director being very clear in giving the respect to the advisor's role in working with the intern. Mentors need to be informed about what being a mentor involves. Periodic meetings, perhaps once every two months, of the mentors themselves to discuss how they are working with their interns would be helpful to all involved. The Project Director can tell the mentor about how other interns are working and the strategies they are using for learning. Keep in mind that the mentors are new at this and are learning almost as much as the intern about how these skills and knowledge are developed.

OBTAINING AND SUPPORTING THE PERSONNEL RESOURCES

The experts who can serve as consultants to interns on a short-term basis, i.e., one month or three or four contacts, need to be encouraged to offer their expertise. Because the project usually will not have enough to pay them their professional scale for their involvement, they need to be sold on the value of their contribution and rewarded with appreciation and respect for what they offer.

The Project Director needs to make it easy for them to participate. For example, they should know that the administrative assistant in the project will be available to help him or her with scheduling, obtaining materials, or getting in other information that is needed.

The first meeting with the resource person should include a brief orientation about the nature of the

program but with more emphasis given to the value and the role that the resource person will play. For example, Paul Hood, a Project Director at FWL who has an extensive professional schedule and is known for his expertise in research design, professional journal writing, dissemination, and research evaluation, made his expertise available to interns with the knowledge that what he had to offer was highly valued and that his need to attend to his own schedules would be respected.

Interns themselves find resources through their own informal contacts or seeking the assistance of peer professionals. As these resource people are identified either by interns or the Project Director or members of the Coordinating Council, the Project Director must develop a profile of what these people can offer, their availability and the areas of expertise which they can provide. Files on the resource people are helpful for quarterly planning meetings when intern and mentor are looking for who might be able to provide the supportive consultation to the intern.

Resource people need to be respected and appreciated for their offerings. This can be done by a memorandum that is sent to them with a copy to the head of the institution and by a personal expression of appreciation by the Project Director and, of course, by the intern. They also will feel rewarded by knowing that what they gave resulted in some positive outcomes. Since they don't receive pay for their service, they need to feel the reward from knowing that their expertise has helped an intern to become more proficient and knowledgeable in the field.

The Project Director needs to review the range and type of resource personnel. There need to be two or three resources for each of the content categories, e.g., project management, technical writing, etc.

KEEPING TRACK

Documentation on a regular basis is the easiest way to keep track of the numerous contacts with people and the numerous tasks, both large and small. A brief summary of what was discussed with an intern, a mentor or resource person can be done quickly and easily on a dictaphone. A running record of the contacts plus a calendar of scheduled meetings in an intern's file makes for an easy review of what was planned and what has happened since. The value of maintaining this kind of documentation is that the unique way in which

each intern learns can be summarized and shared with other interns.

Minutes of the Coordinating Council Meetings and the Intern Meetings are maintained for reference and for reporting to the administration in the form of impromptu meetings or the final report at the end of the year.

KEEPING UP TO DATE

The Project Director has the responsibility of being informed about upcoming professional seminars and workshops which the interns might want to attend and of graduate programs and coursework which would be of interest to interns as well. This requires setting aside time to review the numerous brochures that professional organizations send related to management training, etc., contacting local universities and reviewing the graduate programs that are related to the training, and receiving professional journals which could be used as well, e.g., announcements by the American Management Association.

After gleaning the information and sorting out those conferences which are irrelevant or too expensive or too far away, these are copied and routed to the interns and to the mentors for their perusal. Summaries of articles or titles can also be routed to keep them abreast of what is new or current.

The other form of review that is important to conduct is the review of the materials being used by interns to develop skills. Quarterly planning discussions should include what has worked well and what hasn't and how it could be modified to be more effective. The Project Director can then make note of this and make the modifications or make this known to other interns who plan to use the same materials. For example, one intern found that the module for learning proposal writing was too lengthy, that the most important elements for her learning were learning to distinguish between objectives, goals of a proposal, knowing thoroughly the nature of a scope of work related to the objectives, and the experience of actually writing one that was going to be evaluated by a peer professional. By learning that this was an effective means for one intern, it could be provided as a means for another to learn proposal writing more easily.

DEVELOPMENT OF THE PROGRAM

There is no ready-made program that will suit every institution. Each will have to adapt from other programs and to develop their own as they go. The detailed documentation will assist invaluably in this effort. The quarterly planning documentation which shows the objectives and the strategies and the resources that an intern uses to learn particular skills is a source for evaluating what works most effectively.

Those experiences and strategies which are most effective should then be made note of and used to become a permanent part of the program. Those which are not so effective should be weeded out.

Meetings with mentors regarding the effective experiences of their interns is a source of information about the variety of forms that mentoring will take. Summaries of what is most effective can be prepared for use as a guide for refining the mentor-intern relationship part of the program. Discussions between interns at the intern meetings that are related to what works best in the program, which seminars are most effective, which articles or books are best to read can also be made note of in minutes and organized into resources and references that can be used later.

The Coordinating Council members can be used as a valuable source for discussing the progress of the program and what content, resources and experiences are contributing to make it successful. Those members who are willing to participate in subcommittees for discussion of some content area, i.e., project management, can be formed and used to develop the program.

The interns can be required to submit evaluative summaries of means by which they have succeeded in learning particular content and skills. This requirement gives them an opportunity to take credit for what they have done and what they have gained as well as providing a means by which the Project Director can identify the most effective training methods for the program.

REPORTING THE SUCCESS OF THE PROGRAM

An internship program must be credible in the eyes of those with the most influence in the institution. These individuals are in a position to mention the value of the program at meetings or informally with

others and are in a position to intervene when problems arise in the use of resource people, release time, facilities, and equipment.

Ideally, the Coordinating Council membership includes people of influence in the administration. In this way, these individuals are intimately aware of the progress and are involved in policy-making and development of the program. They, in turn, relay their commitment and belief in the program to other administrators in their upper echelon meetings.

Formal reports which thoroughly detail the nature of the program, who is involved, progress in terms of salary increase, promotion, degrees, publishing of articles, presentation at national or regional conferences should be included in a six-month and year-end report. Preferably, the administration should be apprised of the progress of the program on an at least quarterly basis so that they are in a position to encourage people who have expertise within the institution to contribute their knowledge. Resource people need to be recognized for what they offer and if the recognition is from the administration, it carries more weight.

SUMMARY AND CONCLUDING COMMENTS

From this section on keeping the program going, you may see the complexity of the tasks, communication and roles that the Project Director maintains. Clear and up-to-date communication is one of the keys as well as maintaining the personable but professional relationship with all the members involved.

The focus should always be a serious concern for the professional development of the interns. This means that the content and the experiences must have practical value, that is that they definitely are coorelated with skills and knowledge which are needed as competencies by people who are already in leadership or management positions.

The project itself can be rewarding to all involved and can increase the respect that professionals have for each other as they work as a team contributing their expertise, refining the content and experiences of the program and seeing the results in the form of successful interns who advance in their field.

PROGRAM CONTENT

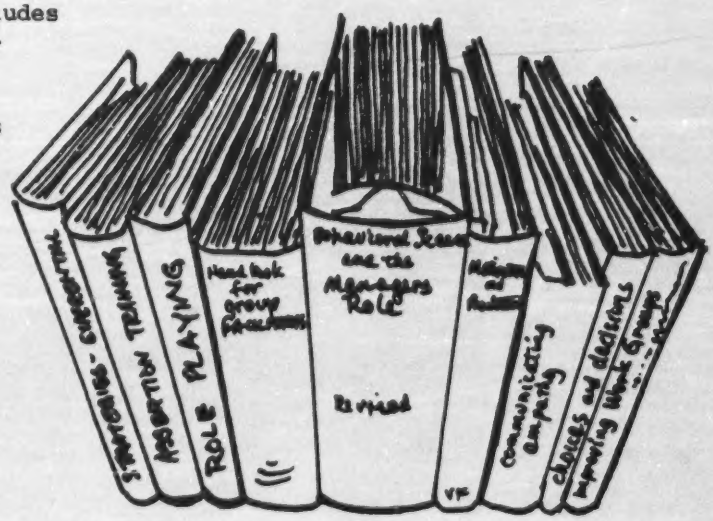
THE NATURE OF THE CONTENT

You must define what knowledge and competencies interns need to have to be leaders to administrators in your institution. This can be done by examining what outstanding people in your institution seem to know and what kinds of competencies they demonstrate. This does not necessarily mean that you conduct a time-consuming research project to learn this. It may mean convening those outstanding people to produce an outline of knowledge and skills which are needed for them to perform their job.

In the W&MLP, the content was identified to fall into four subject areas. These areas were agreed upon by the Coordinating Council which is made up of professionals in educational research and development who have demonstrated their competency by managing research projects and having credibility in their professional field.

Each intern in the program is expected to further his or her knowledge and competency in four major managerial areas:

1. Program Management. This includes: planning, supervision, monitoring, and budget management.
2. Technical Writing. This includes the major requirement of conceptualizing and writing a proposal, and writing technical reports and/or articles for publication.
3. Funding Source Expertise. This includes knowledge of funding sources, procedures for obtaining funds within FWL, and strategies for becoming part of the network in his or her particular field.
4. Professional Expertise. This includes increasing knowledge of content, credibility in the field and development of network support at FWL and in the professional field.



The resources and support for interns to use for their professional development are academic and applied. The best learning is that which combines both knowing the subject matter in the abstract and knowing how to use it in actual practice. To provide the subject knowledge in the abstract, there are modules of sequenced learning which are provided by the program. These are in the area of project management, technical writing and funding source expertise.

THE TECHNICAL WRITING AREA

Development of proposal writing skills is required as part of this category of technical writing. To develop the knowledge and skills necessary for writing a proposal or for management of a proposal writing team, an intern must know the following:

1. Parts of a proposal, i.e., abstract, review of the literature, statement of goals, objectives and activities, scope of work, evaluation procedures, and description of a management plan.
2. How to proceed to obtain the information in preparation for writing in each of the above areas.
3. Skill in outlining the above parts of a proposal.
4. Ability to actually write each of the parts of a proposal as noted above.
5. Ability to discriminate between proposals which are well-written and those which are not.

Interns begin by reading the proposal for their project. Later they read others and critique these with the help of a person who knows proposal writing. They learn to define goals and objectives, to outline a scope of work, and to describe how a review of the literature is conducted.

Interns use a guide to learn proposal writing which includes a resource book which was developed at FWL by Lisa Hunter, et al. A module which provides a step-by-step sequence of experiences and activities can be used by the interns to develop their abilities in this area.

Subsequently, interns may attend workshops on proposal writing and work on a team which produces an actual proposal for funding. They will be required to write a mini-proposal to demonstrate their grasp of proposal writing.

The best way to learn to write publishable articles is to write and to receive critiques from those who already are successful at writing. But to assist interns with basic writing skills, the program provides the following list of modules which they can use in any combination appropriate to their needs:

SERIES 1:	PLANNING
1.0	An Overview
1.1	Problem Definition and Specification of Outcomes
1.2	Consideration of Alternatives
1.3/4.1	Introduction to Development
1.4/5.1	Introduction to Evaluation
1.5/6.1	Introduction to Dissemination and Marketing
SERIES 2:	INFORMATION/DATA COLLECTION AND ORGANIZATION
2.1	Orientation to Collecting and Organizing Information and Data
2.2	Data Management
2.3	The Retrieval of Information Using Bibliographic Sources
2.4	The Retrieval of Information Using Special Sources
SERIES 3:	COMMUNICATION SKILLS
3.1	Oral Communication
3.2	Written Instructional Materials
3.3	Technical Writing: Informal Documents
3.4	Technical Writing: Formal Documents
SERIES 4:	DEVELOPMENT
4.1/1.3	Introduction to Development
4.2	Designing Educational Products
4.3	Product Engineering
4.4	Review, Tryout, and Revision
4.5	Special Problems in Development
SERIES 5:	EVALUATION
5.1/1.4	Introduction to Evaluation
5.2	Measurement and Testing for Developers and Evaluators
5.3	Design of Evaluation Instruments
5.4	Planning and Implementing Evaluation
5.5	Evaluation Problems

SERIES 6: DISSEMINATION AND MARKETING

6.1/1.5	Introduction to Dissemination and Marketing
6.2	Marketing Educational Products

PROJECT MANAGEMENT

The area of project management does not lend itself to as clear a sequential learning plan as the ones described above. One of the reasons is that most effective learning occurs when an intern has to manage a task or supervise other employees' work. Reading or attending workshops about management which produce abstract knowledge is not enough. Direct application of that knowledge becomes real understanding.

For example, an intern learned about managing the development of a proposal by working jointly with her advisor and observing him in the process of planning for and handling meetings with community people, organizing information, seeking advice, coordinating the work of others to obtain information and directing the final proposal writing. Although observation gave her a vicarious experience of management, what she had observed did not become internalized until she was faced with actually managing a group of six professionals in writing a prospectus for a large project. It was at this later time that she learned about delegation of tasks according to the competence of the individual, conducting meetings which were efficient and didn't become bogged down in irrelevant carping or rambling, setting task completion deadlines and monitoring the progress of these six people.

What this implies is that attending seminars or workshops should be postponed until the intern has been primed by having an experience which produces questions and a need for information.

To assist those developing project management skills is a module whose content is provided below. This module provides the intern with a means by which to expose her/himself to various aspects of management. The module is adaptable in that advisor and intern can select sections they wish to work with at a given time.

INTRODUCTION

Description of the Course
Purpose of the Course
How to Use the Course

ACTIVITIES

ACTIVITY I:	Understanding Your Role As Manager
ACTIVITY II:	Learning About the Organization
ACTIVITY III:	Developing Management Skills
	A. Planning
	B. Decision Making
	C. Organizing
	D. Directing
	E. Controlling
ACTIVITY IV:	Time Management
ACTIVITY V:	Interpersonal Communication
ACTIVITY VI:	Leadership and Group Dynamics
ACTIVITY VII:	Human Resource Planning
ACTIVITY IIX:	Professional Development

APPENDCIES

APPENDIX A:	Management Checklist
APPENDIX B:	Project Plan
APPENDIX C:	Month-at-a-Glance
APPENDIX D:	Monthly Planner - 1980
APPENDIX E:	Things to Do
APPENDIX F:	Daily Planner
APPENDIX G:	Planning Activities - 1980
APPENDIX H:	Quarterly Activity Review
APPENDIX I:	Developing Problem Solving Skills
APPENDIX J:	Managing My Time
APPENDIX K:	Goal Analysis
APPENDIX L:	Daily Time Log
APPENDIX M:	Time Management Action Plan

But it must be emphasized that these modules are used in the course of on-the-job experiences. Budget management, especially, is a topic that needs to be learned about through application. A module which is provided for learning budget management in educational R&D requires that interns first review their project's budget, identifying specifically how their own activities are provided for and monitored. They learn the basic terminology, e.g., line items, overhead costs, overruns, underruns, etc. They become familiar with the method of documentation of expenditures and expenditure monitoring through a computerized system. They know how to read print-outs and how to identify

remaining funds to determine whether or not funds are sufficient to cover activities in the scope of work.

The most important aspect of budget management that interns learn is related to reallocation of funds for completion of project tasks. This requires that the intern place her/himself in a manager's position by setting priorities, weighing advantages and consequences of increasing money on one task and decreasing it on another.

PROFESSIONAL EXPERTISE AREA

There is no module which tells an intern how to develop their expertise in a special field. This is developed through counseling with the mentor and with other professionals in the field in which the intern is interested.

Requirements for demonstrating expertise in a given field include having credibility in the eyes of other professionals. This is shown by having published articles in the field, presenting at professional conferences, being sought after to consult or to present by others in the field, and by academic accomplishment through university degrees.

In the field of educational R&D, credibility is demonstrated by being able to obtain funds for conducting research in education.

To give you a notion of the practical on-the-job experience which this project encourages, the following are examples of the experiences which helped interns to develop leadership skills. Four categories of experience are described: planning and supervision; project management; technical writing; knowledge of funding sources and strategies for obtaining funds; and enhancement of an expertise area. The left column describes the interns' activities, the right column identifies the kind of support that was provided by the program.

INTERNS' ACHIEVEMENTS	ASSISTANCE FROM W&MLP
PLANNING AND SUPERVISION	
Amalia and Sandra: Each managed a team of four research professionals in writing of a prospectus for a training program and materials for STRIDE. (Skills developed were task analysis, assessment of individual capabilities, delegation, direction, communication, follow-up contacts, support and provision for feedback.)	Consultation given team management, i.e., appropriate task assignment, setting deadlines, and problem resolution. Sandra also attended a seminar in management.
Chesca: Completed a within-FWL proposal for a feasibility study serving several handicapped students in Contra Costa County. (Skills developed were: selection of teachers as interviewers, task analysis, delegation of authority, interview format development, monitoring and modifying procedures, organizing contacts with the business community and school, and preparation of the final report.) She continued management of proposal development workshops for WEEA throughout the U. S.	Advisor and Project Director advised her of methods for management and supervision of this project.
Barbara: In addition to directing and managing the CETAC project, she developed and held evaluation workshops for state planners and developed and disseminated evaluation materials to Continuing Education organizations throughout the country. She determined the form for negotiating a project extension and made arrangements with the funding source and FWL administration for concluding the project. She also supervised a major subcontract with NUEA for providing training to Continuing Education Deans in a national network.	A seminar was provided on evaluation. Consultation with an FWL professional and advisor provided guidance for obtaining extension.
Davida: Together with Dr. Stan Schainker, she planned and conducted a training workshop for secondary school administrators in the Utah project. She supervised an editor in completion of a director for regional services.	Director assisted in initial planning and provided guidance and support.
Elsie: Continued her responsibility for providing training for four school districts to the Follow Through Project.	Advisor and Drector assisted in providing focus on management.
Joaquin: Coordinated the work of three proposal writers in his department.	

INTERNS' ACHIEVEMENTS	ASSISTANCE FROM W&MLP
BUDGET MANAGEMENT	
Amalia and Sandra: Determined the cost of developing the training packages which were produced by their team.	
Chesca: Allocated the funds for completion of her feasibility study. This required coordination with FWL's finance department: interpreting printouts, sbumitting projects and final accounting.	
Barbara: Determined the use of unexpended funds in her National Project by extending her program beyond the closing date. This entailed budget review, justification of expenditures and allocating funds for the extended activities.	
Elsie: Treasurer for the board for the National Association of Education of Young Children (NAEYC); heads a team to determine the use of $1 million by this association for the coming year.	
Joaquin: Managed the project money for his within-FWL proposal, developed budget statements for several proposals submitted for funding to the U.S. Office of Eduation.	
TECHNICAL WRITING - PROPOSALS	
Amalia and Sandra: Wrote sections of the STRIDE proposal.	
Sandra: Wrote part of a proposal with her advisor, Ralph Baker, which was submitted to the U. S. Department of Labor.	Advisor created opportunity, modeled and involved intern in development of the proposal.
Chesca: Trained professional educators throughout the U. S. in writing proposals for women's equity.	
Joaquin: Completed two porposals submitted to USDE.	Director provided feedback for revision of within-FWL proposal.
Davida: Wrote proposals for presentations at the IRA and ASCD conferences in the Spring of 1981 which were accepted.	Director provided encouragement and strategies for seeking presentations at national conferences.

INTERNS' ACHIEVEMENTS	ASSISTANCE FROM W&MLP
OTHER TECHNICAL WRITING	
Amalia and Sandra: Wrote a prospectus for a training program, prepared progress reports with STRIDE, and made necessary revisions on sections written by other staff.	Director provided feedback and clarification about defining objectives and goals of the prospectus.
Barbara: Continued to edit and write the CETAC newsletter, materials for workshop training sessions throughout the U.S., and continued quarterly reports to Department of Education.	
Chesca: Wrote the final report of her within-FWL feasibility study of education for the severly handicapped.	Director provided support for extending project to produce writing of professional quality.
Davida: Wrote an article on evaluating reading programs which was published in the Fall Michigan Reading Journal.	Program provided editor and consultation for final article.
FUNDING SOURCES AND STRATEGIES	
Interns attended and participated in a seminar on funding sources provided by Chesca, an intern and Betty Ward, Deputy Director of FWL.	Seminar was provided by program.
Chesca: Conducted half of the seminar on funding sources; traveled to Washington, D. C. and Madison, Wisconsin, to contact experts regarding funding for the handicapped and explored funding possibilities in Sacramento with an FWL Project Director.	
Barbara: Took a side trip to Washington to explore funding of program for pre-retirement population and ideas for other laboratory departments; met with representatives of NIMH, DOL, AOA: contacted Kellogg Foundation.	Advisor recommended exploring funding sources and the program paid for trips for contacting key people in funding.
EXPERTISE AREA	
Barbara: Attained PI status; has been recognized as an authority in Continuing Education by FIPSE, AOA, NIMH in addition to Adult and Continuing Education conferences nationally. Has been requested to go to American Samoa to set up a continuing education department at the college and to consult with the Florida State Gerontological Society on program evaluation, and the Education Commission of the States on Adult Education Needs Sensing (part of a Kellogg grant).	Advisor pushed and guided while Director provided support and feedback for revision of memorandum to administration to obtain status of Principal Investigator.

INTERNS' ACHIEVEMENTS	ASSISTANCE FROM W&MLP
EXPERTISE AREA (continued)	
Chesca: Broke into the "old boy" network for funding and programs to serve the handicapped; now has support of prominent innovators and the school administration of Contra Costa County. Within FWL, she has been recognized as a proposal writer, an in-FWL manager, and for her workshops on writing women's equity proposals. In addition, she was invited by the U.S. State Department and addressed a regional conference preceding the International Women's Conference in Copenhagen.	Advisor and Director provided encouragement and program paid for travel to meet key people in the field.
Elsie: Coordinated and conducted an invitational seminar for the National Conference of the Association for Childhood Education International (ACEI) at San Francisco, April 1980; gave an invitational address for the Military Day Care Alliance Spring Workshop at San Francisco, June 1980.	Director provided opportunities for her taking credit for her achievements and integration of her accomplishments into her professional concept.
Amalia: Was invited to a Chicana conference as a professional role model; was invited to a pre-conference planning committee considering the education of Hispanics in the U.S.; is now recognized in FWL as a potential administrator of programs related to the Hispanic population.	
Joaquin: Obtained PI status; recognized as an accomplished professional in the bilingual education of Hispanics (e.g., helped write the proposal for the bilingual evaluation project; was included as senior staff in the project.	Director provided guidance for obtaining status and helped in writing the memorandum to the administration.
Davida: Published an article in the Michigan Reading Journal on the evaluation of reading programs; completed courses toward her M.A. in educational administration; taught a course in secondary reading at U.C. Extension (Berkeley); applied to and presented a workshop at the National ASCD Conference; developed recognition in Utah as a professional in training of secondary school administrators.	Director provided encouragement and program provided an editor for her article and funding for university coursework.

INTERNS' ACHIEVEMENTS

OTHER TECHNICAL WRITING

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CONCLUDING COMMENTS

The individualized program that each intern devises with the help of her/his advisor (mentor), is majorly on-the-job experience, but is enhanced by the provision of other sources of information. These other sources are in the form of modules with sequenced activities, professional seminars or workshops, university courses, books and articles, and most importantly, counseling and discussion with other professionals in their field.

ACCREDITATION FOR THE PROGRAM

IT'S HELPFUL

Providing university graduate credit for professional work done on the job gives incentive to the interns as well as the units needed towards an administrative credential. This would be important to school districts which require administrative credentialing for leadership type positions. The need for credentials could also apply to private industry which may place importance on an MBA graduate degree.

WHAT CAN BE ACCREDITED

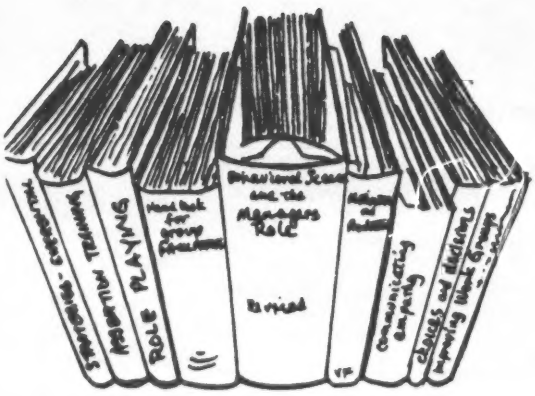
Universities require that content and the skills that are developed be objectively measureable. On-the-job experience can easily be assessed for the skills and the knowledge required to perform. For example, a person who supervises four people and meets task deadlines and favorable performance evaluations by his/her supervisor is doing at least a satisfactory job of supervision and management. In order to make this experience credible to a university, the knowledge and skills required would be to examine a graduate course outline in management. It might have a section on management by objectives and the use of a pert chart for monitoring completion of tasks. In order to make the case that an intern's experience would warrant receiving university credit, you would provide evidence that the job the person performs includes management by objectives and task management by some method, not necessarily by a pert chart system.

In order to ensure that the intern training program leads to a graduate credential, it would be best to examine the requirements for that credential. Then to match or correlate the training program subject matter and experiences to the university requirements. In this way, you could present a credible case for accreditation to the Dean of School Administration in a university.

In the FWL program, interns obtained credit for their on-the-job experiences such as technical writing, i.e., proposals, articles published by FWL or other professional publishers. In one case, an intern designed her own on-the-job experience to obtain credit in a budget management course. She undertook the responsibility of monitoring the budget for the project in which she worked. Thus demonstrating the knowledge and skills which the course covered through reading and other forms of exercises.

MATERIAL NEEDED

You would need more than a good presentation to get the credit. You must provide an outline of a subject area which would convince a university department head that the content and the experiences would qualify the person for credit. An example of this follows:



INTRODUCTION

- Description of the Course
- Purpose of the Course
- How to Use the Course

ACTIVITIES

ACTIVITY I:	Understanding Your Role as Manager
ACTIVITY II:	Learning About the Organization
ACTIVITY III:	Developing Management Skills
	A. Planning
	B. Decision Making
	C. Organizing
	D. Directing
	E. Controlling
ACTIVITY IV:	Time Management
ACTIVITY V:	Interpersonal Communication
ACTIVITY VI:	Leadership and Group Dynamics
ACTIVITY VII:	Human Resource Planning
ACTIVITY IIX:	Professional Development

The other supportive materials you would need are examples of the kinds of experiences and the kinds of jobs that the interns held. Special emphasis should be given to the method of evaluating performance. For example, an intern's article submitted for publishing in a professional journal would certainly qualify as a term paper for a course. An intern's management of a team of peers in the production of a manual for teachers could qualify for credit in

supervision and/or in the design of teaching materials for educators.

All forms of examples cannot be given here because the nature of your training program and the kind of credential for which you are obtaining credit would determine the content and the experiences needed.

WHOM TO SEE

Look for the person who would have an interest in supporting a competency-based program for credit. This could be a professor who is expanding his/her form of experiences for students to include actual practice in the field. This person could be approached and sold on what you have to offer in order then to proceed to getting approval from higher up.

The higher up you go to find a person who would be supportive, the easier it will be to get accreditation. You might need to do a bit of research by asking about the interests and attitudes of the faculty in the department in which you are interested before approaching any of them. You will eventually have to present your case to the university department head, the dean of education or an assistant dean whose specialty area is school administration or business administration, as the case may be.

OTHER DETAILS

The experience at FWL has been the universities give credit only if the person is enrolled in their graduate program. This might be a means by which to increase the chances of an intern's being accepted into a graduate program. The fact that this person is identified as a potential leader and in a training program would enhance this person's application to graduate school.

Another advantage is that as you obtain credit you are more likely to attract more capable interns at the time of recruitment and selection.

Having to correlate the internship training experiences with graduate requirements would help to refine the requirements of your own program. It would force you to eliminate unnecessary skills and knowledge and to concentrate on those which produce competency both on the job and credit towards a needed credential.